Questions and Answers #1 (Public Version) Related to the
RFP for Website Services

October 4, 2019

NOTE: Questions 1, 2, and 3 involve confidential technical information. Any prospective respondent to this RFP who sends a signed NDA via email to the RFP contacts (Becky Gonzales at gonzalesr@ctpf.org, Lupe Garcia at garciam@ctpf.org, and Sandy McNamara at McNamaras@ctpf.org) will receive our non-public version of this document which contains the answers to those three questions via response email. The NDA is only for the purpose of CTPF providing our confidential, technical information to prospective respondents and must be the CTPF NDA that is located on CTPF’s website here: https://www.ctpf.org/post/non-investment-procurements. Additional confidentiality provisions may be negotiated as part of any final contract.

1. Is CTPF using any 3rd party tools to manage accessibility and compliance?

   NDA required. See above note.

2. Can you share details on your current AWS and Azure accounts? i.e. current server specs, any other applications currently hosted there, any existing support agreements, etc.

   NDA required. See above note.

3. In regards to hosting the site on your existing AWS or Azure account, are the accounts currently managed internally by CTPF? If so, would you be looking for the selected vendor to take over all management services?

   NDA required. See above note.

4. Is CTPF looking for vendors to quote the listed enhancements? Or would CTPF accept a proposal with an onboarding phase that would allow the vendor to accurately scope the desired enhancements?

   We do not need the vendors to quote the post-migration enhancements at this time, but would want to make sure the vendor is capable of managing/producing the enhancements.
5. Does CTPF have any documentation relating to the current site? If so will that documentation be shared with the selected vendor?

   We have the assets, branding, and a style guide and functional specs for special pages. We will provide technical specs during the transition period to the new vendor.

6. Has a budget or budget range been identified for these services? If so, will that information be shared with vendors?

   CTPF cannot disclose budget information. We expect that your proposal will contain the lowest rate charged by your firm for government and non-profit clients.

7. Can work be performed outside the USA?

   The work can be performed outside the USA as long as the specific tasks are clearly outlined, disclosed, and approved by the Fund in advance.

8. Please confirm the date for in-person technical presentation and demonstration.

   We have several time slots available during the week of 11/4/2019.

9. What is the estimated budget?

   CTPF cannot disclose budget information. We expect that your proposal will contain the lowest rate charged by your firm for government and non-profit clients.

10. Who is the incumbent vendor?

    Digital Deployment Systems Group, LLC.

11. What version of Drupal are you currently on?

    We are currently running Drupal 6.

12. How many agencies have received the RFP?

    The RFP is publicly posted to our website.

13. What is the budget range allocated for the migration project as well as ongoing support?

    CTPF cannot disclose budget information. We expect that your proposal will contain the lowest rate charged by your firm for government and non-profit clients.

    a. Is this part of this calendar fiscal year? If so, what month is the start of your fiscal year?

    CTPF cannot disclose budget information. We expect that your proposal will contain the lowest rate charged by your firm for government and non-profit clients.
14. From the RFP, under Section E. Deliverables, you have “Site Migration” as a deliverable, while also having “Upgrade to Drupal 8 (Post-migration enhancement)” - what are you seeing as the difference between the migration and upgrade?

The migration is moving what we currently have available to a new vendor. We would prefer to do this before upgrading to a newer version of Drupal.

   a. Is the goal to find a vendor that can provide short-term support for the current website, providing security updates and patches, while migrating the site from your current version of Drupal to Drupal 8 (the latest platform)?

   No. We want the vendor to migrate the site to a new hosting platform while providing support and maintenance and then when that process is complete, we would upgrade to Drupal 8.

15. For the migration, are you open to a fixed-fee discovery in response to this RFP that would define all requirements and then be followed with an estimate for execution based on those requirements?

Please provide an estimate based on the requirements outlined in the RFP.

16. Are there internal business reasons for moving hosting from Pantheon to hosting the website under either your AWS account or our Azure account?

CTPF is unable to disclose this information.

17. What about your current Pantheon hosting services is necessitating a change? Is there something you’re unhappy with?

CTPF is unable to disclose this information.

18. Do you have any internal development resources? If so, what roles do they want to play in this process?

   We have a digital content specialist on staff to oversee the day-to-day operations of the website, manage content, and executive intermediate development projects. We do not have a full-time web developer on staff.

19. Is there a technical landscape document that currently exists, detailing all encompassing 3rd party/SSO/functional requirements?

   This would be provided by our current vendor further along in the process.

20. Do you have any other integration needs that you have yet to identify? For example, I do not see any marketing automation or customer relationship management (CRM) system that are currently integrated with your current website.

   We do not have these needs.

21. What platform is the intranet built in today?

   Drupal 6.
22. What functionality does the intranet have?

The intranet is similar to our current external-facing website.

23. Forms builder function: what are you currently using for email subscription services?

Our CMS has a web form builder which can be used to build forms to collect data.

24. Advanced features Form Submission Module - You have ‘Expected build out between 1-3 years”. Will this be considered in scope? Are we to provide an estimate?

It is not considered in scope. No estimate required.

25. Could you provide more information on “Secure Sign in to Member Self Portal or custom icon/embedded link? Is this in scope? Is it currently in development? How will this impact the ability to support

We are currently working on a Member Self Service Portal which will be a separate site linked to our website. We will need to add a custom icon in a defined section of the home page which will connect users with the new portal landing page.

26. What volume of support do you envision needing per month/quarter?

We would like to know all of the options available from the vendor ranging from custom builds to day to day issue resolution. Please detail any service level agreement available through your firm.

27. Would it be fair to say that you’re looking for a team that can not only maintain and support your website but also offer suggestions on ways to improve the look, feel, conversion paths, etc.?

We would welcome suggestions and feedback.

28. Are you looking for any brand elevation?

We do not need to include any brand elevation work in the scope of this RFP.

29. Is the current CTPF site in a shared or dedicated environment at Pantheon?

CTPF is unable to disclose this information.

30. Does CTPF own the relationship with Pantheon? Or is this managed by the current provider?

CTPF does not own the relationship with Pantheon. This is managed by the current provider.

31. Would CTPF be open to keeping the site at Pantheon for the interim (but switching support and maintenance over to new vendor), until CTPF is ready to begin the upgrade to Drupal 8?

No

32. If migrating to your AWS or Azure environment is desired, can we assume that we do not need to outline any hosting costs in our proposal, and CTPF will take lead in determining appropriate package options and hosting costs?
Yes

33. Is CTPF able to provide administrative/server level access to the environment (to conduct an assessment and support the migration)?

This may happen later in the process for finalists who sign our NDA.

34. Is the CTPF site using a CMS package or solution (provided by the original agency) that works on top of Drupal?

Yes.

35. For the multiple webmasters, how many staff users need access and how many levels of permissions (author, administrators, etc.) Is access restricted based on sections of the site?

We have 3-5 staff members who need access.

36. Should we assume the design will remain ‘as is’ in the initial migration?

Yes, design will remain as is.

37. We understand the Intranet is live today; is it running off the same Drupal 6 instance as the current website?

The Intranet is not currently live.

   a. If so, can we get a login to assess features and level of effort?

      The finalists will be granted access after signing an NDA.

   b. If so, will this remain with the current host until the post-migration phase?

      Yes

   c. For Single Sign-On, is CTPF using Active Directory for its employees?

      It’s not currently set up but will happen in the post-migration enhancement phase.

38. Are partners expected to provide costs for the Form Submission Module and secure sign-in to Member Self-Service Portal in our proposal?

No. Those are post-migration projects.

39. Does the Member Self-Service Portal exist today, or is this a site that needs to be designed and built (in a later phase?)

This portal is currently under development. See question 22 and 25.
40. Has CTPF considered upgrading the website to Drupal 8 as part of the migration, versus separating into two phases? If not, can you share the rationale?

We would prefer to migrate first and then upgrade.

41. Should we separate costs into two phases (pre and post-migration activities)?

Yes.

42. What is CTPF’s overall timing for migration, upgrade, and release of new features?

We hope to have a new vendor on board in November and would then work with the new vendor to develop a proposed timeline.

43. How soon would you look to begin the upgrade to Drupal 8?

That would be determined by the vendor and CTPF after signing a contract for the migration.

44. What is CTPF’s budget for the migration and ongoing support?

CTPF cannot disclose budget information. We expect that your proposal will contain the lowest rate charged by your firm for government and non-profit clients.

45. Is CTPF looking to preserve the design/look and feel of the site or would we be refreshing the design as part of the upgrade to Drupal 8?

The design would remain the same.

46. Related to the newsfeed archive, are you looking for a workflow to auto-archive news posts (based on date, etc.), or will staff be flagging posts for archive manually?

This is not currently in scope but is a post-migration enhancement.

47. What is CTPF’s budget for the upgrade to Drupal 8?

CTPF cannot disclose budget information. We expect that your proposal will contain the lowest rate charged by your firm for government and non-profit clients.

48. Who designed the existing website? Was it by your internal staff or was any vendor contracted?

Digital Deployment Systems Group, LLC.

49. If contracted to a vendor, is that vendor eligible to compete for this solicitation?

Yes.
50. What was the spend for the design and development of the existing website?

   Approximately $89K.

51. What is the budget allocated for the current initiative?

   CTPF cannot disclose budget information. We expect that your proposal will contain the lowest rate charged by your firm for government and non-profit clients.

52. What are the timelines for this solicitation? By when does the agency want the new website to be live?

   The migration timeline will be determined with the new vendor after we sign a contract. See the RFP for timelines for this solicitation.

53. Can the agency point us to any other websites that are good models or examples of what you hope to achieve with the new site?

   We are not looking to redesign the website. We are happy with the current design and expect to maintain it.

54. Does the Agency have a preference towards any CMS like Drupal or WordPress?

   The CMS must be Drupal compatible.

55. Where is the current website hosted? Does the Agency want the vendor to provide hosting also?

   Pantheon. We do want the agency to provide and manage hosting, but this can be done with a 3rd party vendor.

56. Does this opportunity contain Local Preference? If yes, please provide the details

   Bids from all qualified vendors are being accepted and evaluated regardless of vendor location.

57. Could the agency provide more information on the evaluation criteria? What does the Agency mean by “Does the vendor have relative experience in the market?”

   Do you have experience migrating and developing other websites of similar scope and complexity. We are interested in understanding your previous experience.