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**ADDENDUM No. 3**

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**REQUEST FOR PROPOSALS (RFP) NO.:** 1220-030-2018-038

**TITLE:** CITY OF SURREY WEBSITE REDESIGN & CMS REPLACEMENT

**ADDENDUM ISSUE DATE:** OCTOBER 01, 2018

**CLOSING DATE:** OCTOBER 04, 2018 @ 3:00 P.M.

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**INFORMATION FOR PROPONENTS**

This Addendum is issued to provide additional information and clarifications to the RFP for the above named project, to the extent referenced and shall become a part thereof. No consideration will be allowed for extras due to the Proponent not being familiar with this addendum. This Addendum No. 3 contains five (5) pages.

**CLARIFICATIONS:**

**In Schedule C – Form of Proposal, delete “Drupal Hosting Solution Requirements” anywhere it appears and substitute with “City of Surrey Website Redesign & CMS Replacement”.**

**On page 31, Section 2.1.1 of the RFP, delete “. . . supply labour scheduling software . . .” and substitute with “. . . supply a Drupal Hosting Solution . . .”**

**QUESTIONS AND ANSWERS:**

**Q.1. Are Proponents for RFP 2018-038 (Website Redesign) required to know the requirements in RFP 2018-024 (Drupal Hosting) in order to be able to respond to RFP 2018-038?**

**A.1. It is not required that Proponents of RFP 1220-030-2018-038 (“038”) are intensely familiar with RFP 1220-030-2018-024 and vice versa. However, it’s important that both Proponents are aware and understand the high level requirements of each, as Proponents will have to work together, with support of the City, to ensure the new website is set up for success in its new hosting environment.**

**Q.2. Has the city defined content types, and completed a taxonomy and tagging of content?**

**A.2. A bulk of the content types and taxonomy work has been completed and we are in the final stages of developing our taxonomy but we do not yet tagged content and are relying on the successful proponent to provide advice on this.**

**Q.3.** The RFP mentions “user journeys” (ADD 2018-038 - Addendum No. 2, Page 2, Q4).

- a. Can the City elaborate on user experience (journey) mapping and/or other user research and discovery activities it has undertaken as part of any earlier project(s) and what artifacts may be available for review?
- b. When were the artifact(s) completed?
- c. Can the City provide any sample maps or user research and recommendations?

**A.3. Answers:**

- a. We’ve completed user research from a content strategy, key content and flows within the content. We will also be conducting a city-wide survey with citizens to inform the project.
- b. From 2016 to current.
- c. We will provide this to the successful Proponent however if you have specific questions, please reach out to Purchasing.

**Q.4.** Req#2020: Site to be developed to work in the most recent versions of all modern browsers including Chrome, Firefox, Safari, IE11, and Edge.

What is the expectation for “recent versions” of each browser? How many versions of each browser does this include?

**A.4. Recent versions refer to the latest release candidate for each of the outlined browsers.**

**Q.5.** Req#2025: Allow us to release new features as experiments to only a small subset of our visitors, run A/B tests, conduct UX research and hard analytics before releasing to the whole city;

Does this requirement apply to the duration of this project? Or is it referring to being able to do this in the future after the project is complete?

**A.5. This is a feature we wish to have after the site launch**

**Q.6.** Req#2031: Ability for users to be able to print only relevant content on a page;

Is this requirement about:

- a. arranging the content on the page in a print-friendly view (and remove what is deemed as irrelevant programmatically or by some predefined rules); or
- b. allowing the user to choose what they find “relevant” for printing?

**A.6. Option (a.).**

**Q.7.** Req#2054: Ability for users to customize website appearance;

Are the customizations described strictly for the purposes of adhering to accessibility?

**A.7. Correct.**

**Q.8. Req#2002: Sharable preview of unpublished page via URL so it is viewable to those without CMS access. Preference also that viewers can comment inside document;**

What is the use case for this feature? Although possible to configure, we feel this functionality may risk information to be leaked to the public. Understanding the need for unauthenticated users to view unpublished content will help us determine a sound solution.

**A.8. For content authors to share a page with their managers for approval without needing to provide their managers with system access.**

**Q.9. Req#2077: Ability to create and edit clarity copy;**

What is meant by “clarity copy”? Is this microcopy, tooltips, etc? Does it appear in the page or is it more like metadata

**A.9. Clarity copy refers to summaries of the page content. Clarity copy can also sometimes be referred to as summary or teaser text.**

**Q.10. Req#4006: Access to City Data: Can the City please elaborate on what is meant by this requirement.**

**A.10. This requirement can be removed.**

**Q.11. On Page 7 of the RFP, Schedule C-3, question (iv), the City cites the “Drupal Hosting Solution Requirements”. Should this be “Website Redesign and CMS Replacement Requirements”?**

**A.11. This is a typo in the RFP, page 72. Point (iv) should be “Website Redesign and CMS Replacement Requirements”.**

**Q.12. With regards to Response in the C-3-1 Spreadsheet, can the City provide additional clarification on “Provided” versus “Modification Needed”. Does “Provided” include functionality and features that are implemented through Drupal Core and Modules (development services will still be required to configure these)? Whereas “Modification Needed” is custom module or other custom development?**

**A.12. The interpretation of “Provided” stated above is correct. Select “Modification Needed” if the Proponent’s ability to meet the requirement lays outside of the configuration capabilities. If the Proponent needs to customize an existing Drupal module code base to create a new module then select “Modification needed”. If the Proponent needs to create a brand new custom module from scratch please select “Modification needed”.**

**Q.13. Regarding the City’s target state goal of having “clear and documented pathways for growth with the City and Drupal.” RFP page 21, are there deliverables the City is interested in creating for this project related to road mapping and future phase planning?**

**A.13. The City is moving to Drupal as its declared CMS and the City needs to the successful Proponent to partner with and guide the City as the site grows and Drupal moves into future versions. For example, how will the City manage updates for major Drupal releases and setup the site to work with multiple vendors to leverage open source.**

**Q.14. Req #2082 - Styles tiles;  
What are these and how are they used currently on the site?**

**A.14. Style tiles are a milestone deliverable as part of the design process.**

Q.15. Req #2062 - Create new forms.

- The plumbing/building inspection form goes offsite to another system.
- <https://www.surrey.ca/city-services/15078.aspx>
- <https://apps.surrey.ca/PublicPortal/BAIR/common/Index.jsp>
- During the live QA session a question was asked about integrating Drupal forms into deeper systems and the answer was that wasn't necessary. Are you still looking to direct people offsite to fill in forms then?

A.15. Users should be able to fill out basic forms within the site but it's a desirable feature that the form input feeds into internal system databases.

Q.16. Req #2042 - Employee data file

- a. What is the employee data file used for and what format is that data provided in?
- b. How is it currently sync to the web environment?
- c. Would that file be accessible to an external hosting service?

A.16. Answers:

- a. The employee data file is in XML format and is generated regularly from PeopleSoft, our HR system. It is used to present citizens the way to search for the contact information for specific City staff. It can be seen here at Find a Person at the City: <https://www.surrey.ca/contact-sfiis.aspx>
- b. The City has a custom module built in OpenText that allows searching and presenting the XML file.
- c. The successful Proponent would work alongside the City and our PeopleSoft tool to deliver this.

Q.16. Req #2036;

- a. Is requirement #2036 a duplicate of #2035?
- b. If not what is the difference?

A.16. Answers:

- a. No
- b. The difference is metadata on pages vs metadata for assets (PDFs, images, etc)

Q.17. Req #2024; Is the city open to purchasing access to cross browser testing tools to do their own validation?

A.17. The City is open to suggestions but QA is a joint responsibility of the successful Proponent and the City.

Q.18. Req #2098; What are the specifications on the existing solr implementation? Do you have any technical documents available describing this?

A.18. The existing SOLR implementation is provided by a third party vendor. The City will connect the successful Proponent with this third party vendor to answer any technical questions. The City is planning to continue with SOLR but is open to other solutions.

Q.19. Req #4007; What does "Access to city data" mean?

A.19. This is not in the Security Requirements template. This can be removed.

**Q.20. Req #4008; Drupal passwords are typically hashed and stored in the database so they are not in plain text. This is not the same as encryption, is that a problem?**

**A.20. One way hashing is deemed a viable method for storing passwords. Integration with Active Directory though would obviate the need for managing passwords in Drupal for most users.**

**Q.21. Req #4003; What is Surrey's password policy at a technical level?**

**A.21. The capability to create user ID based on a naming convention, minimum lengths depending on whether user is a general user or admin user, passwords must contain numeric and both upper and lowercase letters, users must change their passwords within a pre-defined period, users cannot reuse their last few passwords, and account lockouts must occur after a certain number of failed attempts. The City's specific password policy is confidential but will be provided to the successful proponent. Currently the password policy is managed by Active Directory.**

**Q.22. Some of the requirements in this contract do not seem to be relevant to the services engagement. May we assume that we can negotiate these as part of contract, or would you prefer that we declare each of these in the Statement of Departures? Examples of contractual clauses which do not seem appropriate for a professional services engagement include but are not limited to:**

- 15.2 Access to City Data, Security Logs and Reports
- 15.6 City Data Protection (in particular 15.6.1 which refers to the encryption standards provided by the Drupal host)
- 16. Security Incident or City Data Breach Response (in particular 16.9 which requires the vendor to cover all City costs incurred in the event of a data breach)

The above are examples which appear to be the domain of the Drupal Hosting provider, not the website design and development provider. How would Surrey prefer that we identify these departures in our response if we are only bidding on the redesign and CMS platform opportunity and not on the Drupal hosting opportunity? Does Surrey have a separate contract form for professional services engagements?

**A.22. The City recommends the Proponent list any departure in Section 15.2, 15,6 and 16 to the Statement of Departures.**

**Q.23. Section 16.9 regarding liability of the provider related to any data breach and Section 24 which requires escrow of all code including passwords to be transported on a schedule to a third party provider appears to create an onerous liability on the service provider. Should there be a security breach with the third party provider, how would liability be determined?**

**A.23. The City recommends the Proponent list any departure in Section 16.9 to the Statement of Departures.**

END OF ADDENDUM

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All Addenda will become part of the RFP Documents.

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