



REQUEST FOR PROPOSAL (RFP)

WEBSITE REDESIGN, DEVELOPMENT, IMPLEMENTATION AND HOSTING FOR CONTRA COSTA COUNTY EMPLOYEES' RETIREMENT ASSOCIATION (CCERA)

RFP Opening date:

Tuesday, September 23, 2014

Proposal Submission Deadline:

5 p.m. Friday, October 17, 2014

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1.0 INTRODUCTION

1.1 Background

The Contra Costa County Employees' Retirement Association (CCCERA) is a contributory defined benefit plan initially organized under the provisions of the County Employees' Retirement Law of 1937 on July 1, 1945. CCCERA administers the retirement system for Contra Costa County and 16 other independent governmental districts within the county. CCCERA has current assets under management of \$6.5 billion and serves more than 20,000 workers and retirees. It provides benefits upon retirement, death or disability of members. CCCERA is governed by its own board and is an independent governmental entity separate and distinct from the County of Contra Costa. CCCERA's Board of Retirement is a 12-member board that operates with three alternates.

CCCERA is seeking proposals to redesign, develop, implement and host its current website cccera.org. Although others may and do view and use CCCERA's website, its primary and target audience is the organization's approximately 20,000 members.

1.2 General Scope of Project

CCCERA is seeking the services of an experienced web design company to complete the comprehensive redesign and deployment of the organization's website, cccera.org. The successful proposal will address the issues included in the Statement of Work (2.0) in the most cost-effective way possible.

CCCERA is committed to reinvigorating its website design to include a fresh, innovative and easily navigable style that promotes easy access to information and a user friendly experience.

The successful proposal will include evidence of experience as well as evidence of strategies that best combines the worlds of form and function.

1.3 Overview of Submission Requirements

Questions and clarification may be obtained by contacting Kurt Schneider at (925) 521-3960. Final proposals must be received in the CCCERA office no later than 5 p.m. Friday, October 17, 2014. A submitting firm must submit one (1) original and three (3) paper hard-copies of its proposal with each packaged and clearly marked. Although paper proposals are required, submitters also may include multi-media supplements including (but not limited to) CDs, DVDs, and Portable Hard Drives. Each of the four (4) paper proposal should include its own supplementary materials. Please DO NOT include link information to Internet-based supplements. Such links will not be considered by the proposal consideration team.

Submit proposals by the deadline via US mail or in person to:

Contra Costa County Employees' Retirement Association
C/O Kurt Schneider
1355 Willow Way, Suite 221
Concord, CA 94520

2.0 STATEMENT OF WORK

This document includes only a preliminary statement of work and is not indicative of a final such statement. A final Statement of Work will be developed by CCCERA and the successful proposer. Despite limited Statement of Work prior to awarding of project, all proposals should include a detailed timeline including redesigned website launch date.

Please note: CCCERA's current website was designed in-house and operates on a Dreamweaver-based platform. Although the current site includes an enormous cache of important information for both employers and Association members, it is not easily navigable or intuitively workable. Further, the overall design lacks a modern and professional look and feel.

CCCERA desires a completely overhauled and redesigned site that ultimately will allow agency employees to easily upload several types of assets including Word documents, PDFs, images, video, audio, fillable forms and more. The newly designed website must provide ease-of-use for active and retired CCCERA members, employers, and the public. The new site also must have a fresh and modern look that has the capability of integrating and sharing social media campaigns.

The new site must incorporate optimal information architecture (labeling, hovering, etc.) as well as technical architecture (SEO, crawlability, indexation, canonicalization, robot exclusion, etc.). Response speeds should be as fast as possible and the design should be responsive across all platforms.

2.1 General Desired Enhancements

Outside the scope of improvements for individual pages, CCCERA desires these general and overall improvements for its redesigned website.

- A.** Overall look (beginning with "Home" page and continuing throughout the site) that incorporates a modern, "flat" design with clean lines and consistent colors (colors TBD).
- B.** User friendly design – especially for older retirees who may not be as willing to "search" for needed information.
- C.** Fillable form functionality with future capabilities that would allow possibility of signature verification that might eventually allow online form submittal and other e-based use.
- D.** Site designer-led training should allow CCCERA staff to easily perform routine content management and selected staff to perform more complicated tasks. Such training should be integrated into proposal.
- E.** High-speed upload/download times.

- F. Cross-platform functionality.
- G. Password protected Board member accounts where trustees can access confidential meeting materials and information.
- H. Analytic and data gathering tools.
- I. Social media integration.
- J. Fully searchable with links between pages as needed.
- K. State-of-the-art security and encryption
- L. Web interface options that can accommodate individuals with disabilities in accordance with the Americans with Disabilities Act (ADA). See rules and an example at http://www.ada.gov/websites2_prnt.pdf.
- M. Public access to all of the features on the website is not dependent on specific browser, that is, the web interface is browser agnostic and works with commonly used browsers found on Windows, Linux and Mac computer systems (Internet Explorer, Firefox, Chrome, Safari...).
- N. Pages and features **compatible with limited bandwidth access** by the public.
- O. Capability of the website administrator staff to report website maintenance activity and statistics (updates, downloadable documents, web pages, number of visits and broken links.)
- P. Annual support and maintenance of the website. Services such as refreshing the design elements, updating of technology in the website design, engineering, search engine optimization, content management. CCCERA would like to have these elements included with this project beginning with the first day of “go live” for the website for 1 year and, as an optional ongoing item and cost, the continuation of this support in 1 year increments thereafter.
- Q. The implementation must be accomplished in a manner that minimizes disruption of business via the Internet.

2.2 Sample Site Organizational Structure

The authors of the winning proposal are asked to serve in functional and advisory capacities during the CCCERA website redesign. Therefore, the following individual page suggestions are meant to serve as a general guideline for proposal submitters.

CCCERA understands page details and indeed overall details may change as the Statement of Work is designed and vetted. Even after the Statement of Work is finalized designers will be asked and expected to lend both aesthetic and practical expertise to the project. The information below represents current CCCERA expectations. It is understood however, that CCCERA and the Contractor will work together to develop the final website design and components.

Website design shall include:

A. Home Page

The home page is the showcase of the website redesign and should be especially visually pleasing, clean and easy to navigate. The new design should include CCCERA brand colors and a large standalone graphic (photo) with navigable side, top and bottom bars. Buttons should be hoverable with

drop down menus. Predominant side buttons are for each of our types of users and should include:

- New Hires
- Retirees
- Active Members
- Employers
- Deferred Members

Top bar hoverable buttons should include (but may not be limited to)

- Forms
- Publications
- Investments
- Board
- Stats at a Glance
- About CCCERA
- News and Updates
- Pension Calculator
- Contribution Rates
- Search

Bottom bar items should include (but may not be limited to)

- Site Index
- Contact Us
- Employment at CCCERA
- Search

B. Individual “Interior” Pages

Each page linked from the home page will follow stylistic guidelines established on the website home page. Pages will include appropriate security measures as well as functionality that allows uploads from designated staff members and easy downloads for customers as needed. Capabilities such as customer comments, organization blogs, possible customer submissions, contact forms and more will be part of the design discussion with expert opinion expected from Contractor and ultimate system-wide functions determined and authorized by CCCERA.

C. Additional Required Services

In addition to pre-design, design and post-design services of Contractor, the following services will or may be required (These possibilities should be factored into the Proposer’s fee structure.):

- Approval process may require Contractor’s attendance at a meeting of CCCERA’s Retirement Board. A presentation to Board trustees may also be required.

- Contractor will meet regularly with CCCERA’s website development team before, during, and after the website build.
- Contractor will provide up to three (3) training sessions for staff members who will be tasked with uploading to and providing routine maintenance for website.
- Contractor will provide a two-week testing period during which CCCERA staff will test, evaluate and suggest any needed changes for website before going live with new design. Any needed corrections or compliance deficiencies will be corrected within 10 business days of the close of the testing period.
- Contractor will provide backup, catastrophic recovery, troubleshooting and on-call service for the website for a period to be determined in final Scope of Work document.

3.0 PROPOSAL REQUIREMENTS

All firms submitting a proposal must adhere to the following format. All requested information and documentation must be included in the final proposal. **Failure** to meet minimum qualifications, follow format, include information or meet deadline will result in **disqualification from the formal review process.**

3.1 Minimum Qualifications

To qualify to take part in CCCERA’s website redesign RFP process, Contractors must meet the following criteria:

- Five (5) or more years experience (As of September 1, 2014) providing web design, development, implementation, web hosting and related services similar in scope to the project proposed in this RFP. Legality as a business entity must be verifiable via business license.
- Ability to provide a list of three (3) verifiable client references.
- Proposer’s office must be located in close enough proximity to CCCERA to allow easy availability for frequent, sudden, urgent or emergency meeting or help situations. Suggestion is no more than 150 miles from CCCERA’s office in Concord, California.
- Proposer’s personnel assigned to the CCCERA project each must have at least five (5) years experience in web design, development and implementation. Not all five years experience need to have been with Proposer.

3.2 Proposal Format

A total of **four (4)** separate hard copies of a firm’s proposal must be packaged together, clearly marked, and delivered in person or via US mail by **5 p.m. PST on October 17, 2014** to the CCCERA office:

**1355 Willow Way, Suite 221
Concord, CA 94520**

Late, incomplete and improperly formatted proposals will be disqualified from consideration. Multi-media items including (but not limited to) CDs, DVDs, and Portable Hard Drives may be included as addendums, but such items are **NOT** a substitute for hard copy proposals. All pages of the proposal should include a footer indicating the name of the firm and page number. Individual sections should be labeled.

3.2.1 Section 1: Cover Letter

Cover letters must include:

- Name, address and other contact information (including relevant email address(s)) of proposing firm
- Name and contact information of project lead
- Proposer’s Federal Employer Identification number and Corporate Identification number if applicable.
- Printed name, title and signature of individual(s) authorized to bind the Proposer contractually. Signature should follow this verbiage (statement must be printed on cover letter) ***“My (our) signature(s) on this cover letter certify the information contained in this proposal is accurate and that all addendums submitted with this proposal are likewise certified to be true and binding upon the Proposer.”***

Unsigned cover letters lacking the above verbiage will be cause for rejection of the proposal.

3.2.2 Section 2: Table of Contents

Each proposal must contain a table of contents. Table of contents should include noting any information deemed “proprietary.” Any such information also should be clearly marked “PROPRIETARY” on the relevant respective page(s). While CCCERA strives to preserve such information, please note that following awarding of contract, all proposals become public information and proprietary designation may not preclude its disclosure.

3.2.3 Section 3: Firm’s Experience

Provide explanation of submitting firm’s experience providing services similar in scope to CCCERA’s RFP. Include:

- Relevant examples of similar, completed projects
- List of websites designed
- Any related photos, etc.
- Relevant dates, timelines for completion, scope of work, etc. for such projects

3.2.4 Section 4: Principal Resumes

Provide narrative explaining roles of any involved firm personnel expected to be involved in the CCCERA website project. Include brief explanations of individual expertise. Resumes of all principals to be involved in the project should be included.

3.2.5 Section 5: Work Plan

Given the General Desired Enhancements included in this RFP, include a work plan that includes (but is not limited to) these elements:

- Explanation of your general approach to this type of project
- Description of approach to the tasks listed under 2.0 of this RFP
- Explanation of phases Proposer deems necessary for this task.
- Realistic timeline for each individual phase and total completion of project.
- Any other relevant information that would help evaluators understand Proposer’s technique, needs, expectations, capabilities, and requirements.

3.2.6 Section 6: Projected Cost

Projected project cost will be a major – but not the only – criteria in CCCERA’s selection process. Therefore, the Projected Cost section of the proposal should include:

- Short opening narrative that includes total cost in its closing sentence.
- Line item costs (as far as possible) for components/phases of project
- Final cost again reflected in total of line items

PLEASE NOTE: Costs included in the winning proposal are final and binding.

Payments to winning proposer will be made as follows:

- One-third of total cost paid “up-front” to begin project.
- Monthly payments totally no more than one-third total costs paid throughout the build process.
- Final one-third paid within 10 business days of website launch.

3.2.7 Section 7: Required Addendums

Required (and included in RFP packet) addendums should be ordered as follows:

- **Addendum A:** Photocopy of Business License(s) that prove Proposer has been providing web design, implementation and hosting services for at least five (5) years as of September 1, 2014.
- **Addendum B:** Client References and list of websites
- **Addendum C:** Resumes of all personnel to be involved in CCCERA website project
- **Addendum D:** Authorized/Key Personnel
- **Addendum E:** Suggested timeline for all phases of the project, testing period and launch date

4.0 GENERAL TERMS AND CONDITIONS

The following general terms and conditions apply to receipt and execution of this RFP

4.1 RFP Acceptance

Late Proposals (Reaching CCCERA office 5:01 pm October 17, 2014 and later) will not be accepted. Incomplete, improper and unsigned proposals also will be rejected. Questions regarding this RFP will be accepted until ten (10) business days (5 pm) prior to final submission deadline.

Call Kurt Schneider with questions at (925) 521-3960 or email him at: kschneider@ret.cccounty.us

- All proposals will be date and time stamped as they are received
- All proposals will be kept together throughout evaluation period
- CCCERA strives for transparency and while proposals are held in confidence throughout the evaluation process, once the contract is awarded all proposals are considered public information. Any information included in the proposal that is deemed “proprietary” should be marked as such – but please note that although CCCERA will seek to preserve proprietary information, such marking does not necessarily preclude its disclosure.

4.2 RFP Confidentiality

All responses to this RFP become the property of CCCERA and will be kept confidential until such time as a recommendation for award of a retainer agreement 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 its submittal is exempt from public disclosure, such portion may be marked “confidential.” CCCERA will use reasonable and legally permissible means to ensure that such confidential information is safeguarded to the extent that CCCERA, in its independent judgment, concludes that the information is in fact exempt from disclosure, but CCCERA will not be liable for inadvertent disclosure of such materials, data and information. Proposals marked “confidential” in their

entirety will not be honored and CCCERA will not deny public disclosure of all or any portion of submittals so marked.

By submitting information with portions marked “confidential”, the respondent represents it has a good faith belief that such material is exempt from disclosure under the California Public Records Act and agrees to reimburse CCCERA for, and to indemnify, defend and hold harmless CCCERA, its officers, fiduciaries, 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 (collectively, “Claims”) arising from or relating to CCCERA’s non-disclosure of any such designated portions of a proposal if disclosure is deemed required by law or court order.

4.3 RFP Withdrawal

CCCERA retains at all times the right to withdraw or cancel this RFP, to refuse to accept a proposal from any respondent, and to modify or amend any part of this RFP.

4.4 Proposal Withdrawal

Respondents may withdraw all or any portion of a proposal at any time during and after the review and award process up to ratification of an agreement between CCCERA and the designated agency.

4.5 Applicable Laws Shall Apply

The contract awarded shall be governed in all respects by the laws of the State of California and any litigation with respect thereto shall be brought in the courts of the State of California. The company awarded the contract related to this RFP shall comply with applicable federal, state, and local laws and regulations.

4.6 Indemnification

The successful vendor shall agree to indemnify, hold harmless and defend CCCERA from and against liabilities, losses, damages and claims arising out of the negligence or willful misconduct of the vendor.

4.7 Collusion Among Respondents

Each respondent, by submitting a proposal, certifies that it is not party to any collusive action or any action that may be in violation of state or federal law.

4.8 One Submittal Per Company

Only one (1) proposal per company is permitted. If a company is found to have submitted more than one proposal under different names or names of company subdivisions, all submitted proposals will be disqualified from consideration.

4.9 Proposal Costs

Costs associated with developing proposals and in anticipation of award of the CCCERA website redesign agreement are entirely the responsibility of the Proposers and shall not be charged to CCCERA.

4.10 Reasonable Cause Rejection

CCCERA reserves the right to reject all proposals for reasonable cause. If the costs of all proposals are deemed excessive, CCCERA is not required to award an agreement.

5.0 EVALUATION PROCESS

All proposals must pass an initial screening to determine if they have met the conditions set forth within the RFP. **Proposals found to be noncompliant will be rejected.** Proposals passing the initial screening will be reviewed and evaluated by the “Website Redesign Committee.” The Committee will be comprised of CCCERA staff members involved with overseeing or maintaining the organization’s current website.

Awarding of the contract for CCCERA website redesign and execution will be based on the criteria below. A negotiated contract will be awarded to the agency that best meets these criteria at a reasonable price, not necessarily the lowest price.

Evaluation Criteria include:

- **Competence.** Demonstrated competence and professional qualifications as outlined in this RFP necessary to successfully perform the work required by CCCERA.
- **Recent and Related Experience.** Recent experience, including client references indicating successful completion of similar projects.
- **Experienced and Qualified Personnel.** Demonstrable skill and experience in RFP required categories by personnel to be assigned to the project.
- **Quality of References.** Level of satisfaction of references provided and design/functionality of similarly sites designed by Proposer.
- **Proposed approach** in completing work.
- **Fee Structure.** How reasonable and competitive is fee structure proposed by firm?
- **Finalist Interview/Demonstration.** At CCCERA’s discretion, up to three (3) of the highest-scoring proposers may be invited to participate in a Finalist Interview/Demonstration at CCCERA’s offices in Concord, CA. Specifics, including length of interview/demonstration and expectations, will be provided at least two (2) weeks prior to the interview date for those firms selected to take part in the process.

6.0 POST SELECTION PROTOCOL

If, at any time during the RFP process, CCCERA determines that, in its opinion, the results of the process are unsatisfactory, CCCERA reserves the right to discontinue the process and decline to award an agreement.

Any award made is subject to final negotiations.

Following contract award:

- All proposers will be notified of the outcome of the RFP.
- All copies of all proposals remain with CCCERA and become its property. See Section 5.1 of this RFP.
- All proposals fall under public “Right to Know” laws and following awarding of contract will be available, upon request, for public scrutiny.