



COUNTY OF SONOMA

Web Content Management System (CMS)

Request for Proposals (RFP)

The County of Sonoma is pleased to invite you to respond to a Request for Proposals for a new Content Management System.

Proposals must be received no later than 2:00 p.m. on March
15, 2019

A. Introduction/Purpose

The County of Sonoma invites sealed proposals for a Web Content Management System for the County's Website that provides; authoring, administrative tools, document control, editing, collaboration, is scalable, secure, and up to date with most recent ADA standards.

1. Project Background and Description

The County is governed by a five member Board of Supervisors which sets policy and appoints the County Administrator to direct day-to-day government operations. Based in the City of Santa Rosa, California, the County employs a workforce of over 5000 employees in more than 26 departments and agencies, hereinafter referred to as departments, in facilities located throughout the City and County. Additional information about the County can be accessed via the web at: <http://sonomacounty.ca.gov/Home/>

This project is intended to select and implement a new CMS for the County of Sonoma. The current CMS for the County is Ektron version 9.10 which has been in place since 2012. The county is looking to replace the current CMS to meet the growing demands of our constituents and customers.

Current statistics Sonomacounty.ca.gov (Current CMS (Ektron)):

- Page views (2018 total): 5,727,755
- Sessions (2018 total): 2,156,044

Websites managed: 16

Approximate numbers as of 2/4/2019

System	Webpages	Images	Documents
Current CMS (Ektron)	25,544**	19,554	10,891
Legacy CMS	1,001	***	***
Legacy Static Websites Internet	11,537	11,190	29,175
Legacy Static Websites Intranet	3,203	6,421	3,113

** Includes widgets

*** Included in Legacy Static Websites Internet

2. Desired Goals/Objectives/Outcomes

The goals of the project are to:

- Implement a new, user-friendly, secure web-based CMS that includes tools for creating, organizing, publishing, and maintaining digital information on the Internet;
- Train system administrators, developers, and content providers in the use of the new CMS;
- Migrate existing content to the new system including documents, images, etc.;
- Provide an intuitive and simple user experience for both internal and external users;
- Ensure flexibility within the CMS for future redesign

B. *Statement of Requirements - Services Required of Successful Proposer*

The County is seeking qualified and experienced vendors that have a proven track record in planning, implementing, training, and supporting CMS solutions. Vendors submitting a proposal must meet the following minimum requirements:

- Successful experience implementing the proposed software solution(s) with similar size, desired CMS features, and complexity as Sonoma County;
- Successful experience migrating historical content from existing systems;
- Successful experience supporting and hosting complex CMS solution

The RFP response should include detailed descriptions regarding system software licensing, hardware, installation, configuration, deliverables, and system infrastructure support and maintenance. The scope of services must include planning, providing, organizing and implementing the CMS including, but not limited to:

- a) Implementation services and support;
- b) Historical data conversion including extraction from old systems, any necessary transformations, and loading into new system;
- c) Application integration services;
- d) Testing, including acceptance testing with full and detailed documentation;
- e) Training for support staff, end users, and administrators;
- f) Software administration training materials;
- g) Technical support, and related documentation including system architecture and function diagrams as appropriate;
- h) Support and maintenance, including upgrade and patch cycles

Integral to the scope of services, respondents are required to complete Attachment F
– Functional and Technical Requirements and Use Cases.

Supplier qualifications:

- Supplier must be authorized to do business in California;
- Have demonstrable experience implementing a Content Management System;
- Provide staff training from experienced instructors;
- Ability to migrate selected current data to new platform

C. Local Preference

It is the policy of the County to promote employment and business opportunities for local residents and firms on all contracts and give preference to local residents, workers, businesses and consultants to the extent consistent with the law and interests of the public. A Local Service Provider is defined as a business or consultant who has a valid physical address located within Sonoma County from which the supplier or consultant operates or performs business on a day-to-day basis, and holds a valid business license if required by a city within the jurisdiction of Sonoma County.

For quantitative evaluations of proposals, the locality of the service provider shall be included as an evaluation criterion in RFPs. Extra percentage weighting of 5% shall be provided in the total rating score for local service providers. For qualitative evaluations of proposals, Departments shall consider the locality of consultants or businesses and their sub-consultants along with other criteria identified in the RFP. If there is more than one service provider being considered and the providers are competitively matched in terms of other criteria, local service providers should be selected. If hiring sub-consultants, the County strongly encourages using local service providers.

More information about the County's purchasing policies can be found on:

[Local Preference Policy for Services](#)

D. Schedule

The following schedule is subject to change. Except as provided below, changes will only be made by written amendment to this Request for Proposals, which amendment shall be issued to all parties by the Department issuing this proposal.

Date	Event
February 8, 2019	Release Request for Proposals
February 22, 2019	Proposer's Questions Due by 5:00 p.m.
March 1, 2019	County's Responses to Questions Due
March 15, 2019	Proposals Due by 2:00 p.m.
March 18-29, 2019	Proposals Evaluated by County
April 2-5 , 2019	Interviews/Demonstrations Conducted
May 14, 2019	Notice of Intent to Award (subject to delay without notice to proposers)
May 21, 2019	Board of Supervisors Awards Contract (subject to delay without notice to proposers)

E. Pre-Bid Conference

[Section Omitted]

F. Questions

Proposers will be required to submit any and all questions in writing per the schedule in order for staff to prepare written responses to all consultants. Written answers will be shared with all potential bidders through an addendum on the County's Supplier Portal and email notification. Questions should be sent via e-mail directly to WebCMS-RFP@sonoma-county.org. Questions will not be accepted by phone.

G. Corrections and Addenda

1. If a proposer discovers any ambiguity, conflict, discrepancy, omission, or other error in this RFP, the proposer shall immediately notify the contact person of such error in writing and request clarification or modification of the document. Modifications will be made by addenda as indicated below to all parties in receipt of this RFP.
2. If a proposer fails to notify the contact person prior to the date fixed for submission of proposals of a known error in the RFP, or an error that reasonably should have been known, the proposer shall submit a proposal at their own risk, and if the proposer is awarded a contract they shall not be entitled to additional compensation or time by reason of the error or its subsequent correction.

3. Addenda issued by the County interpreting or changing any of the items in this RFP, including all modifications thereof, shall be incorporated in the proposal. The proposer shall submit the addenda cover sheet with the proposal (or deliver them to Danielle Letourneau, Department Analyst, Information Systems Department, 2615 Paulin Dr., Santa Rosa, CA 95403, if the proposer has previously submitted a proposal to the Department). Any oral communication by the County's designated contact person or any other County staff member concerning this RFP is not binding on the County and shall in no way modify this RFP or any obligations arising hereunder.

H. *Proposal Submittal*

1. Form: Proposers must submit one (1) electronic copy to the County of Sonoma's Supplier Portal. The link to the Supplier Portal is: [Sonoma County Supplier Portal](#).

Note: Proposers must be registered to submit electronic submittals. See registration instructions on the Supplier Portal link above.

Additionally proposers must submit (1) signed original, and four (4) copies of the signed proposal per the schedule or as revised by addendum. Proposals must be enclosed in a sealed envelope or package and clearly marked "WEB CONTENT MANAGEMENT SYSTEM RFP". Proposals shall be submitted to:

Danielle Letourneau
Department Analyst
Information Systems Department
2615 Paulin Dr.
Santa Rosa, CA 95403

2. Due Date: Proposals must be received no later than the date and time listed in the schedule, or as revised by addendum. The proposal due date is subject to change. If the proposal due date is changed, all known recipients of the original RFP will be notified of the new date.
3. General Instructions: To receive consideration, proposals shall be made in accordance with the following general instructions:
 - a) The completed proposal shall be without alterations or erasures.
 - b) No oral or telephonic proposals will be considered.
 - c) The submission of a proposal shall be an indication that the proposer has investigated and satisfied him/herself as to the conditions to be encountered, the character, quality and scope of the work to be performed, and the

requirements of the County, including all terms and conditions contained within this RFP.

4. Proposal Format and Contents: For ease of review and to facilitate evaluation, the proposals for this project should be organized and presented in the order requested as follows:

a) **Section I - Organizational Information:**

Provide specific information concerning the firm in this section, including the legal name, address and telephone number of your company and the type of entity (sole proprietorship, partnership, or corporation and whether public or private). Include the name and telephone number of the person(s) in your company authorized to execute the proposed contract. If two or more firms are involved in a joint venture or association, the proposal must clearly delineate the respective areas of authority and responsibility of each party. All parties signing the Agreement with the County must be individually liable for the completion of the entire project even when the areas of responsibility under the terms of the joint venture or association are limited.

Organization Chart

[Provide an organization chart of the organization, which identifies each member of the firm involved with the program. The chart should show the organizational structure of the team, the specialty or position of each team member. Include all specialty Sub-Consultants that would be expected to be utilized on the program.]

*[If this is a partnership or joint venture (j-v), describe in detail:
how the partnership or j-v will be organized,
who will be in overall control of the program
how it will function on a day-to-day basis throughout the program
what will you do to guarantee continuity for all services]*

Key Personnel

[Identify the key personnel and their back-ups that will be assigned to the program]

b) **Section II - Qualifications and Experience:**

Provide specific information in this section concerning the firm's experience in the services specified in this RFP, preferably within the State of California.

Examples of completed projects, as current as possible, should be submitted, as appropriate. **References are required.** Please provide names, addresses, and telephone numbers of contact persons within three (3) client agencies for whom similar services have been provided.

Debarment or Other Disqualification

Proposer must disclose any debarment or other disqualification as a supplier or vendor for any federal, state or local entities. Proposer must describe the nature of the debarment/disqualification, including where and how to find such detailed information

Firm Description

[Provide a description of the firm, number of years in business, and its core competencies]

c) Section III - Project Approach and Work Schedule:

- a) Describe the methodology developed to perform all required services, with a proposed schedule to complete the project. This schedule should contain specific milestones and dates of completion which will be used to set schedules;
- b) Identify the extent of County personnel involvement deemed necessary, including key decision points at each stage of the project;
- c) Proposers shall identify all subcontractors they intend to use for the proposed scope of work. For each subcontractor listed, proposers shall indicate (1) what products and/or services are to be supplied by that subcontractor and, (2) what percentage of the overall scope of work that subcontractor will perform;
- d) Example(s) of automated “out of the box” reports. Describe the ability to customize reports without vendor participation;
- e) Example(s) of metrics and analysis provided “out of the box;”
- f) Content Migration Plan, where applicable as indicated above;
- g) Description of proposed modules, third-party applications, required licenses or functions needed to successfully implement County’s requirements;
- h) A detail training plan whether virtual or onsite and the target audience;
- i) A testing plan and acceptance procedure for quality control

Scope of Services (Technical):

Describe the technical architecture of your company’s solution and environment. Include as appropriate:

- a) Networks;
- b) Servers;
- c) Data centers (locations);
- d) Administration access and controls;
- e) Disaster Recovery Plan;
- f) Backup and recovery;
- g) Platform;
- h) Application and data;
- i) Content / Data conversion and integration methods;
- j) Architecture references;
- k) User access controls, scoping, auditing;
- l) Input controls;
- m) Operations and support;
- n) Security;
- o) Monitoring;
- p) Single sign on;
- q) LDAP Active Directory integration;

Provide a description of the methodology developed to perform all required services, including an affirmation that the services will be timely completed within the contract period.

Include your response to the Statement of Requirements as referenced in Section B., beginning on page 1.

d) Section IV - Cost of Service:

The proposal shall clearly state ALL of the costs associated with the project, broken down by category of products and services, and all on-going costs for recommended or required products and services, such as maintenance.

The project costs must be broken out and include all expenses that will be charged to the County, including but not limited hourly rates for labor, software costs, software maintenance costs, implementation fees, shipping, insurance, communications, documentation reproduction, and all expenses, including travel, meal reimbursement, hotel per diems, taxes, etc. Failure to clearly identify all costs associated with the proposal may be cause for rejection of the Consultant's proposal.

e) Section V – Identification of subcontractors:

Proposers shall identify all subcontractors they intend to use for the proposed scope of work. For each subcontractor listed, proposers shall indicate (1) what products and/or services are to be supplied by that subcontractor and, (2) what percentage of the overall scope of work that subcontractor will perform.

f) **Section VI - Insurance:**

The selected proposer will be required to submit and comply with all insurance as described in the attached Sample Agreement. Securing this insurance is a condition of award for this contract.

g) **Section VII - Additional Information:**

Include any other information you believe to be pertinent but not required.

h) **Section VIII – Contract Terms:**

Proposers must include a statement acknowledging their willingness to accept the sample contract terms (Attachment A) or identify specific exceptions to the sample agreement.

I. Selection Process

1. All proposals received by the specified deadline will be reviewed by the County for content, including but not limited to fee, related experience and professional qualifications of the bidding consultants.
2. County employees will not participate in the selection process when those employees have a relationship with a person or business entity submitting a proposal which would subject those employees to the prohibition of Section 87100 of the Government Code. Any person or business entity submitting a proposal who has such a relationship with a County employee who may be involved in the selection process shall advise the County of the name of the County employee in the proposal.
3. Proposals may be evaluated using the following criteria (note that there is no value or ranking implied in the order of this list):
 - a) Demonstrated ability to perform the services described;
 - b) Experience, qualifications and expertise;
 - c) Quality of work as verified by references;
 - d) Costs relative to the scope of services;

- e) A demonstrated history of providing similar services to comparable entities;
 - f) Willingness to accept the County's contract terms; and
 - g) Any other factors the evaluation committee deems relevant. (When such criteria are used for evaluation purposes, the basis for scoring will be clearly documented and will become part of the public record.).
 - h) The locality of the Proposer;
 - i) Functionally and technically complete system(s) that best meet the needs of the County;
 - j) Overall responses to Attachment F – Functional and Technical Requirements and Use Cases
4. The County Department Head in consultation with the Purchasing Agent reserves the right, in their sole discretion, to take any of the following actions at any time before Board approval of an award: waive informalities or minor irregularities in any proposals received, reject any and all proposals, cancel the RFP, or modify and re-issue the RFP. Failure to furnish all information requested or to follow the format requested herein may disqualify the proposer, in the sole discretion of the County. False, incomplete, misleading or unresponsive statements in a proposal may also be sufficient cause for a proposal's rejection.
 5. The County may, during the evaluation process, request from any proposer additional information which the County deems necessary to determine the proposer's ability to perform the required services. If such information is requested, the proposer shall be permitted three (3) business days to submit the information requested.
 6. An error in the proposal may cause the rejection of that proposal; however, the County may, in its sole discretion, retain the proposal and make certain corrections. In determining if a correction will be made, the County will consider the conformance of the proposal to the format and content required by the RFP, and any unusual complexity of the format and content required by the RFP. If the proposer's intent is clearly established based on review of the complete proposal submittal, the County may, at its sole option, correct an error based on that established content. The County may also correct obvious clerical errors. The County may also request clarification from a proposer on any item in a proposal that County believes to be in error.
 7. The County reserves the right to select the proposal(s) which in its sole judgment best meets the needs of the County and to award to only one or multiple qualified submittals. ***The lowest proposed cost is not the sole criterion for recommending***

contract award. The County also makes no guarantee of any or equal amounts of work.

8. All firms responding to this RFP will be notified of their selection or non-selection after the evaluation committee has completed the selection process.
9. Generally, the firm selected by the Evaluation Committee will be recommended to the Board of Supervisors for this project, but the Board is not bound to accept the recommendation or award the project to the recommended firm.

J. Finalist Interviews

After initial screening, the evaluation committee may select those firms deemed most qualified for this project for further evaluation. Interviews of these selected firms may be conducted as part of the final selection process. Interviews may or may not have their own separate scoring during the evaluation process.

K. General Information

1. Rules and Regulations

- a) The issuance of this solicitation does not constitute an award commitment on the part of the County, and the County shall not pay for costs incurred in the preparation or submission of proposals. All costs and expenses associated with the preparation of this proposal shall be borne by the proposer.
- b) Sonoma County reserves the right to reject any or all proposals or portions thereof if the County determines that it is in the best interest of the County to do so.
- c) The County may waive any deviation in a proposal. The County's waiver of a deviation shall in no way modify the RFP requirements nor excuse the successful proposer from full compliance with any resultant agreement requirements or obligations. Sonoma County reserves the right to reject any or all proposals, or to waive any defect or irregularity in a proposal. The County further reserves the right to award the agreement to the proposer or proposers that, in the County's judgment, best serves the needs of Sonoma County.
- d) All proposers submit their proposals to the County with the understanding that the recommended selection of the review committee is final and subject only to review and final approval by the Department Director (via delegation), the County Purchasing Agent or the Board of Supervisors.
- e) Upon submission, all proposals shall be treated as confidential documents until the selection process is completed. Once the notice of intent to award is issued by the County, all proposals shall be deemed public record. In the event that a proposer desires to claim portions of its proposal exempt from disclosure, it is incumbent

upon the proposer to clearly identify those portions with the word "Confidential" printed on the top right hand corner of each page for which such privilege is claimed, and to clearly identify the information claimed confidential by highlighting, underlining, or bracketing it, etc. Examples of confidential materials include trade secrets. Each page shall be clearly marked and readily separable from the proposal in order to facilitate public inspection of the non-confidential portion of the proposal. The County will consider a proposer's request for exemptions from disclosure; however, the County will make its decision based upon applicable laws. An assertion by a proposer that the entire proposal, large portions of the proposal, or a significant element of the proposal, are exempt from disclosure will not be honored and the proposal may be rejected as non-responsive. Prices, makes and models or catalog numbers of the items offered, deliverables, and terms of payment shall be publicly available regardless of any designation to the contrary.

- f) The County will endeavor to restrict distribution of material designated as confidential to only those individuals involved in the review and analysis of the proposals. Proposers are cautioned that materials designated as confidential may nevertheless be subject to disclosure. Proposers are advised that the County does not wish to receive confidential or proprietary information and those proposers are not to supply such information except when it is absolutely necessary. If any information or materials in any proposal submitted are labeled confidential or proprietary, the proposal shall include the following clause:
 - a. [Legal name of proposer] shall indemnify, defend and hold harmless the County of Sonoma, its officers, agents and employees from and against any request, action or proceeding of any nature and any damages or liability of any nature, specifically including attorneys' fees awarded under the California Public Records Act (Government Code §6250 et seq.) Arising out of, concerning or in any way involving any materials or information in this proposal that [legal name of proposer] has labeled as confidential, proprietary or otherwise not subject to disclosure as a public record.

2. Nonliability of County

The County shall not be liable for any precontractual expenses incurred by the proposer or selected contractor or contractors. The County shall be held harmless and free from any and all liability, claims, or expenses whatsoever incurred by, or on behalf of, any person or organization responding to this RFP.

3. Proposal Alternatives

Proposers may not take exception or make material alterations to any requirement of the RFP. Alternatives to the RFP may be submitted as separate proposals and so noted on the cover of the proposal. The County reserves the right to consider such alternative proposals, and to award an agreement based thereon if it is determined to be in the County's best interest and such proposal satisfies all minimum qualifications specified in the RFP. Please indicate clearly in the proposal that the proposal offers an alternative to the RFP.

4. Lobbying

Any party submitting a proposal or a party representing a proposer shall not influence or attempt to influence any member of the selection committee, any member of the Board of Supervisors, or any employee of the County of Sonoma, with regard to the acceptance of a proposal. Any party attempting to influence the RFP process through ex-parte contact may be subject to rejection of their proposal.

5. Form of Agreement

- a) No agreement with the County shall have any effect until a contract has been signed by both parties. Pursuant to Sonoma County Code Section 1-11, County personnel are without authorization to waive or modify agreement requirements.
- b) A sample of the agreement is included as Attachment A hereto. Proposers must be willing to provide the required insurance and accept the terms of this sample agreement. With few exceptions, the terms of the County's standard agreement will not be negotiated. *Indemnification language will not be negotiated.*
- c) Proposals submitted shall include a statement that (i) the proposer has reviewed the sample agreement and will agree to the terms contained therein if selected, or (ii) all terms and conditions are acceptable to the proposer except as noted specifically in the proposal. A proposer taking exception to the County's sample agreement must also provide alternative language for those provisions considered objectionable to the proposer. Please note that any exceptions or changes requested to the Agreement may constitute grounds to reject the proposal.
- d) Failure to address exceptions to the sample agreement in your proposal will be construed as acceptance of all terms and conditions contained therein.
- e) Submission of additional contract exceptions after the proposal submission deadline may result in rejection of the consultant's proposal.

6. Duration of Proposal; Cancellation of Awards; Time of the Essence

- a) All proposals will remain in effect and shall be legally binding for at least ninety (90) days.
- b) Unless otherwise authorized by County, the selected consultant will be required to execute an agreement with the County for the services requested within sixty (60) days of the County's notice of intent to award. If agreement on terms and conditions acceptable to the County cannot be achieved within that timeframe, or if, after reasonable attempts to negotiate such terms and conditions, it appears that an agreement will not be possible, as determined at the sole discretion of the County, the County reserves the right to retract any notice of intent to award and proceed with awards to other consultants, or not award at all.

7. Withdrawal and Submission of Modified Proposal

- a) A proposer may withdraw a proposal at any time prior to the submission deadline by submitting a written notification of withdrawal signed by the proposer or his/her authorized agent. Another proposal may be submitted prior to the deadline. A proposal may not be changed after the designated deadline for submission of proposals.

L. Protest Process

Any and all protests must be in writing and must comply with the timelines and procedures set forth at: [Protests and Appeals for Goods and Professional Services Procurements](#)

M. Living Wage

The contractor/franchisee/economic development assistance recipient shall comply with any and all federal, state, and local laws – including, but not limited to the County of Sonoma Living Wage Ordinance – affecting the services provided by this contract/franchise agreement. Without limiting the generality of the foregoing, the contractor/franchisee/economic development assistance recipient expressly acknowledges and agrees that this contract/franchise/economic development assistance agreement is subject to the provisions of Article XXVI of Chapter 2 of the Sonoma County Code, requiring payment of a living wage to covered employees. Noncompliance during the term of the contract/franchise/economic development assistance agreement will be considered a material breach and may result in termination of the contract/franchise/economic development assistance agreement or pursuit of other legal or administrative remedies.

The link to the Living Wage Ordinance is: <http://sonomacounty.ca.gov/CAO/Living-Wage-Ordinance/>

Attachments:

Attachment A: Sample Agreement

Attachment B: Declaration of Local Business for Services

Attachment C: Living Wage Evaluation Preference Form

Attachment D: Living Wage Responsible Bidder Form

Attachment E: Sample Insurance Requirements

Attachment F: Functional and Technical Requirements