Q&A regarding the Boston.gov Redesign RFP

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I. Vision

What do you like most about your current website? What do you dislike most about your current website?

From the organization, design, and functionality of the current City website, we are not delivering a modern and easily accessible web experience for our end users. However, the site houses a truly incredible amount of information and boasts several online services (e.g., obtaining dog licenses, subscribing to notifications) that users might be surprised we provide. In many areas, we have excelled at making information and services *available* but have failed to make them truly *accessible*. That's where our partnership with you comes in. How can we make the wealth of information and services available from the City accessible for end users in a way that is delightful, welcoming, and highly useful?

What is your vision for Boston.gov going forward?

We expect the launch of a beta Boston.gov later this year to be the beginning -- not the end -- of reimagining Boston's digital front door.

Through the redesign process, we will upgrade to a more robust CMS which will allow us to greatly improve the digital experience we can deliver to users. From extensive user research and testing phases, we will emerge with a better understanding of our end users. However, we also expect to grow that understanding beyond the most common user groups and as our users' needs continue to rapidly evolve. In addition, we expect to bring a number of micro-sites back onto Boston.gov and establish processes for accommodating the needs of large and varied city agencies.

The design work done during the redesign will set the stage for Boston.gov going forward and will also help determine our development priorites going forward.

What does success look like?

Our goal is to deliver a web experience that is beautifully designed, delightful to use, and thoroughly useful. While these goals are in many ways subjective, there are also several metrics we can look at to determine whether we are meeting these goals. We will, for example, look to see an increase in the number of transactions happening online, a decrease in the complaints received about the site, and an increase in overall site traffic (particularly as they relate to our core 10-15 user journeys).

II. Project Teams and Roles

What does the City's web team look like, and what level of involvement do you expect they'll have in the project?

We will have a project manager dedicating 100% of their time quarterbacking this project, helping to coordinate with various user audiences, internal teams, the CMS team, and the Design firm. The rest of the City's web team will be heavily involved in the redesign but will split their time with their day-to-day responsibilities. This team consists of two web content managers, a social media/engagement strategist, graphic designer, and web developer. Our hope is that during the course of the redesign, the City's web team is heavily involved in user research, user testing (recruiting users and also participating themselves), content migration, and working closely with the CMS vendor to configure the new CMS in order to lend their experience, and importantly to learn, strengthen their own skills, and continue the evolution of Boston.gov beyond 2015.

How do you envision the design and CMS partners working together and with the City's team?

We expect our partners will work together with the City as a coordination liaison, and also closely with each other in certain stages of the project. The CMS partner will work to implement a new CMS platform, configuring user permissions at the City's direction, implementing HTML templates delivered by the design partner, and assisting the City's team in migrating content from the current CMS platform. We expect our design partner to assist us in understanding our users (providing user journeys for the top 10-15 most requested services), developing new information architecture and design standards (informed by this research), and designing and delivering key page templates in HTML form. To assist with continued iteration of Boston.gov, we expect our design partner to inform the strategic direction for developing Boston.gov beyong the launch of a beta site (RFP Section 2.4).

We're currently evaluating a number of CMS partners, and expect to make a decision on a partner in mid/late May. We are not able to discuss the vendors under consideration since the evaluation process is underway. However, we can tell you we are primarily considering open source based platforms with a robust ecosystem around them. We expect to spend the next few months on training, configuring the new CMS, and migration of evergreen content. As our design partner builds recommendations around information architecture and user journeys, we will work with the CMS partner to configure those paths and begin migrating additional content. Our CMS partner will implement remaining design elements (page templates, pattern library, style guide) from the design partner (delivered in .HTML format).

Our design partner will work with our Project Manager to set a schedule and format for weekly project updates. We do not have a preferred communication channel for projects -- if our design partner has a preference (e.g., basecamp, jira) we are open to using that platform.

We're very interested in involving the public, both on- and off-line in our redesign process, and in the evolution of our digital initiatives going forward. We have set up a site: Next.Boston.gov that we expect will evolve into a blog over the coming weeks to discuss the process. We're open to other ideas for involving others in the process as well.

III. Users & Stakeholders

Who should be included for user feedback/testing and what do you know about them already?

We are looking for a design partner who will not only help us learn more about the users Boston.gov should be serving, but also help determine which groups we should be focused on.

We have not formally defined primary and secondary target audiences for Boston.gov. However, we do collect data via google analytics, feedback surveys, Mayor's Hotline requests, and anecdotes that we will share with our design partner (in their entirety) to inform decisions around which groups should be targeted. Below, we've provided a few links to give you a high level view of that data. On our site we also provide a link to "Top Requested" links (updated manually based on anecdotal information from users).

We will look to our design partner to help determine the most effective methods to engage these user groups, and make recommendations around the extent of feedback that is useful during each stage (e.g. QA, UAT). The City will help recruit users for testing and feedback. Examples of users groups are small business owners, tourists, parents, building contractors, City employees, and media. We expect a crisper and more complete definition of Boston.gov's user groups to emerge through the research phase. We do not expect to abandon any current user groups (e.g., visitors), but expect to emerge from the design process with a better understanding for how to prioritize growth/development of the site to serve each user group.

High level user data*
City website analytics: http://www.cityofboston.gov/doit/metrics
Top visited pages: https://data.cityofboston.gov/City-Services/Cityofboston-gov-Top-10-pages/nbv5-39vx
Top service requests:
https://data.cityofboston.gov/City-Services/Mayor-s-24-Hour-Hotline-Service-Requests/awu8-dc52
Top complaints from users:

- Poor Navigation: Information is difficult to find, or takes too many clicks to get to.
- Content: Content is too dense, outdated, or uses terminology that is not accessible or understandable to the majority of users.
- Color & Vibrancy: Users want a site that is colorful, easy to read visually, visual navigation to identify tasks easier, and imagery that is indicative of what Boston is really like, not just stock photos.

**We will provide this data (google analytics, service requests, survey feedback) in its entirety at the start of the project*

What methods should be used for user research and user testing, and how should users be recruited?

User research and testing should cover the broad variety of Boston.gov users, including those who are not currently using Boston.gov. We are able to provide additional information on the demographic makeup of Boston to further inform user testing and research. We will work with our design partner to recruit users for feedback and coordinate outreach for any surveys.

In addition, we plan to partner with our Office of New Bostonians for access to various ethnic communities, and partner with Tech Goes Home for access to low income groups. We expect different methods may be

used for different groups and at different stages of the process, and we are open to recommendations from our design partner on the form this engagement takes (e.g., surveys, focus groups, polls). We do not expect to provide remuneration for participation in user feedback and user testing. We have six (and potentially more) conference rooms and a training room that can be used for user testing or focus groups, though it is difficult to have them available at the same time without advance notice.

User feedback should be incorporated throughout the process, including proposed information architectures. If multiple design firms are partnering on the design phase of the project, we encourage those teams to determine how and when to hand off work to one another to collect and incorporate user feedback.

We have attempted to collect feedback from residents in different formats and for different initiatives. We're happy to share any and all feedback on which methods were most effective, and share any data collected as well.

From the user research phase of work, we expect a better understanding of our 10-15 primary user groups, their personas, and user journeys. How *are* we currently serving those groups? How *should* we be serving those user groups?

How should internal stakeholders be involved, and what approvals are necessary on project decisions?

As experts on various end user groups (and users of Boston.gov themselves), we expect internal department liaisons to play a key role in identifying large user groups and understand how those constituents interact with the City. These internal teams will be available for interviews and/or focus groups as needed. We will look to our design partner for the suggested format and timing for gathering feedback from these groups.

The ultimate stakeholder for Boston.gov is the end user. As a result, we do not expect to allot significant time to review/approval loops outside the core redesign team within City Hall when those decisions are based in sound and robust user research. Agreement from the core internal redesign team on major project decisions will be sufficient, and this internal team will be responsible for making sure all major decisions (including branding decisions) are socialized among key stakeholders in City Hall.

IV. Project Scope & Deliverables

We received several great questions about the scope of the project. We've consolidated them and have attempted to address them all below.

First, which sites are to be included in the redesign?

The focus of the redesign is Boston.gov, but we understand a redesigned Boston.gov with more streamlined user paths willl require content to be centrally managed that currently exists on other sites. In particular, on the call, we referenced a number of other sites: 7 Boston agency sites (Boston Public Schools, Dept. of Neighborhood Development, Boston Public Health Commission, Boston Water and Sewer Commission, Boston Housing Authority, Boston Redevelopment Authority, and Boston Police Dept.) and ~30 microsites related to campaigns and other initiatives (e.g., onein3boston.com). The long term goal is to bring these

sites back onto the City of Boston web platform, but the roadmap for the re-integration of all of these sites is not realistically within the scope of this project. Rather, we expect to work with our design partner to build a strategy for a re-integration roadmap and select one site (or a handful of sites) to re-integrate in order for the City to carry out the remaining re-integrations on a longer time horizon. The City's internal website (hub.cityofboston.gov) will undergo a separate redesign and user research process.

Second, what applications or interactive features should be considered?

Boston.gov currently integrates with a handful of third party applications and proprietary tools. Examples include our online service portal which integrates with Lagan, the City's CRM system, to allow users to report anything from potholes to missed garbage pickup, and No-Tow which allows users to sign up for street sweeping alerts. We expect our design partner to provide recommendations on ways to improve the user experience on a handful of apps/tools where they are related to our core 10-15 typical user scenarios. We will not realistically be able to address all of our apps/tools in the scope of this project, but expect the handful of cases to serve as a template for the City's team to address the remaining tools/apps..

The development of new tools and apps is not specifically in the scope of this project. However, recommendations tools necessary for a better user experience will be strongly considered and implemented, if possible, as part of the redesign. For example, we expect the new Boston.gov will involve a greater degree of user engagement than exists currently. This may come in the form of user-generated content, discussion boards, etc. The ability for our web team to implement these tools will be based on their complexity and functionality of our new CMS.

Third, what digital brand standards does Boston have in place already? What freedom is there to stray from the current brand? Are there anticipated brand extensions beyond Boston.gov?

As part of the redesign, we will look to our design partner to develop a digital brand for Boston. We are open to moving entirely away from our current CityofBoston.gov branding. We do not have a formal set of brand guidelines that our design partner must adhere to, nor a branding partner that our selected designer will need to consult with. It is important that our brand be consistent enough that users will know they are interacting with the City of Boston no matter where they are on our site (and across other digital applications), but remain flexible enough to apply to a wide variety of tasks and agencies (for example, must cover use cases as serious as Emergency Management and as playful as our Center for Youth and Families).

As it relates to imagery, we do have a library of photos taken by City Hall photographers and have photographers on staff who can assist in shooting additional photos that would be helpful for the site. We are open to showing people in photos if they have signed releases.

Fourth, is the list of templates and modules you provided meant to be all inclusive? How should we plan to deliver/implement them?

The list of templates and widgets provided in Appendix B is meant to give a sense for the amount of work expected, but is not fixed. We expect the list may change based on user research and feedback. We ask that these page templates be delivered to our CMS vendor in .HTML format. Until we select a CMS partner,

we will not have specifics around the amount of time needed for them to implement these page templates and widgets after they are delivered by the design firm.

Fifth, what are your expectations around content audit and migration?

Boston.gov currently has approximately 5,000 pages of content. We expect to archive much of this content and migrate content to the new Boston.gov as is necessary for the user journeys we define with our design partner during the redesign.

We will conduct an internal content audit with various City departments during the course of the redesign. How we prioritize this content will be informed by the user research phase of the project and what is most important for the top 10-15 user journeys on the site. We welcome feedback from our design partner as it relates to migration, audit, and copywriting strategy. We expect some content may be migrated to the new site as-is, but much will need to be reworked/tailored to newly defined user paths. We are also open to wholly new types of content, depending on user needs that are identified during user research.

The City's team is responsible for the content audit, content strategy planning, style and tone guidelines, and content governance plan, but welcomes recommendations from our design partner regarding each of these components.

Lastly, which things did you not mention in the RPF that you will consider feedback on?

Several of you asked great questions about the scope of the project that we did not specifically address in the RFP. Many areas that were raised are ones where we will carefully consider input and recommendations from our design partner. These include, but are not limited to: SEO, changes to content creation workflow, software development cycle, and google analytics configuration.

Regarding SEO, we do not currently have a person or team in place dedicated to this and so do not regularly perform reviews of content strategy. Feedback related to SEO and content strategy from our design partner is welcome and can be implemented by the web team.

Regarding content creation workflow, currently content on our site is authored in the CMS by a department or agency liaison, and then published to a staging environment. The department or agency reviews internally, and then a web content manager publishes live to Boston.gov. The web redesign opens an opportunity for us to review and improve this process. We have not specifically asked either the design or CMS partner to address this within the scope of the project, but we will consider any recommendations made throughout the course of the project that address content creation workflow.

Regarding google analytics: we currently use google analytics to measure user activity. Our web content managers regularly monitor site activity, but we do not have a formal process in place for using that data to inform UX decisions. We will carefully consider recommendations from our partners regarding success metrics and google analytics configuration.

V. Submission Logistics, Legal Questions, and Other Clarifications

Clarification on the budget and price proposal

We appreciate that we have asked design firms for proposals for a truly innovative, large scale redesign on an aggressive timeline and within a lean budget. We want to clarify that the stated $200,000 - $300,000 cost expectation refers only to the core deliverables (Sections 2.1 through 2.4). Fixed prices quoted in the Price Proposal should include estimates for all expenses related to those deliverables -- this includes reimbursable expenses. The fixed price does not include a budget for licensed fonts, which we will discuss with our design partner during the redesign.

Section 3.10 of the RFP asks you to think beyond what can fit in the time and budget constraints we've placed on this project. This is an opportunity to go beyond the core scope and restrictions. What efforts become feasible as part of your proposal given additional budget? How do you expect this would impact the success of the overall project?

If you have a vision for this project that doesn't fit neatly into the constraints we've defined, please use Section 3.10 to share that vision.

Clarification on modifications to contracts and Terms and Conditions

We received questions on the conference call and in writing regarding flexibility in contract terms and the City's terms and conditions. We'd like to clarify our response.

Design firms should not expect to incorporate changes to the City of Boston's Standard Contract, Form CM10, CM11, and the Supplemental IT Terms, which will be part of the final contract. To the extent that any clarifications of the City Contract terms and conditions are necessary, those clarifications will be included in the final Contract. A Statement of Work and clarifying terms will be included in the final Contract as approved by the City.

A note on accessibility

One of our stated goals is to improve the accessibility of information and services available on Boston.gov. This means improving the site's navigation and information architecture to better surface relevant content for users, but it also means considering various ADA accessibility guidelines and incorporating the needs of users for whom English is a second language.

We currently utilize Google Translate on a number of pages to translate content. Going forward, we would like to extend this capability to all of our pages and target certain areas of the site for native translation (e.g., site navigation). These decisions should be informed by user research, and we are open to exploring alternative tools/services that help us better serve our constituents. At a minimum, we expect our design partner to inform the elegant integration of a translation option into our page templates.

In addition, our templates, style guide, and page elements must meet ADA guidelines for design and usability. We expect our CMS partner will be able to translate those designs into responsive versions across browsers and devices, with assistance from our design partner. We can also partner with our Disability Commission for additional ADA compliance guidance.

Will you accept CAGR in lieu of audited financial statements or a Dun & Bradstreet report?
We require all vendors to submit either their audited financial statements or a Dun & Bradstreet report. We cannot accept growth rates or other financial metrics in lieu of these documents.

Will you give equal weight to design firms from other cities?
Yes, location is not part of the evaluation criteria. We are looking for the best firm to help us achieve our goals for a welcoming, beautiful, and highly useful Boston.gov.

Section 3 requests the timeline per section to be stated in days. Are these calendar days or business days?
Business days.

Why was the RFP split between the CMS and Design RFP?
We wanted to break the work into manageable chunks. Vendors are not precluded from submitting proposals to both RFPs.

How many levels of user permissions do you expect in your CMS configuration?
Given our current content workflow, we envision at least two levels of CMS user permissions (content authors and content administrators) and may have as many as five additional levels of more granular permissions (e.g., authoring documents, page template design).