



## Request for Proposal Website Redesign and Customer Portal

### 1) Introduction

The Jamestown Board of Public Utilities (“JBPU”) is soliciting proposals for the purpose of selecting a qualified firm (“Firm”) to provide professional services associated with a re-design of JBPU’s public website and the creation of a customer portal.

The scope of work comprises of two components. The first component (“A”) includes new website design, migration of existing material, material enhancement, implementation, content management system implantation (CMS), CMS training, and potentially hosting services. The second component (“B”) includes the development of an online user portal and the integration of that portal into JBPU’s existing systems. JBPU reserves the right to exercise either component independently, however preference may be given to a Firm who can provide a wholistic approach to both components at the best value.

Proposals must be submitted via e-mail to [brobbins@jamestownbpu.com](mailto:brobbins@jamestownbpu.com) by **10 AM EDT Monday April 16, 2018**.

## 2) Component A Proposal “Website”

The “Firm” shall provide all the necessary resources to design and implement a new website for the Jamestown Board of Public Utilities (“JBPU”) including the artistic and technical skills needed for a project of this nature. The firm will offer a hosted solution including a content management system (CMS) with managed updates provided by the Firm. The new website shall have all the required functionality noted later in this section and the proposal shall include any optional functionality (along with associated cost adders as appropriate) that can be provided by the Firm. The Firm shall create website wireframes, flow charts, and menus for JBPU approval. The Firm shall create draft renderings of the top wire frame choices selected by JBPU. Quantities of wireframe/draft renderings shall be limited to 5 major revisions each for the purposes of this proposal. JBPU will choose the preferred design and the Firm shall create a functional website based on that design integrating the required and optional functionality, existing content (that is deemed of value by the JBPU), as well as some potentially new content created by JBPU. The Firm will be responsible for any digital graphics and/or digital media necessary for the design (excluding high resolution photos for the banners) in order to create a complete site consistent with the existing branding. JBPU currently uses a hosted HTML website with no content management system ([www.jamestownbpu.com](http://www.jamestownbpu.com)).

JBPU will contract with local artists to generate the photography necessary for the website banner photographs.

### Required Functionality

The following functionality is required to be implemented by the Firm (in addition to work noted above). Any exceptions should be explicitly noted in proposals. The site requirements are in no particular order.

- a) Mobile friendly
- b) Recorded/Live video capability
- c) Use of mega menus and action buttons within those menus
- d) Interactive photo slide shows
- e) No reliance on Adobe Flash for functionality
- f) The Content Management System (CMS) shall be easy to use and operable by users without coding experience and shall enable the following:
  - a. Drag and drop media
  - b. Simple copy/paste from Microsoft Word for text content
  - c. The ability to assign different levels of access for users with a minimum of 3 levels (or equivalent convention)
    - i. Designer - shall be able to edit any portion of the website including the coding.
    - ii. Publisher – Shall be able to review/approve content and publish but shall not be able to change the overall design of the website.
    - iii. Content Editor – Shall be able to edit/generate content but shall not have the ability to publish that content directly.
  - d. CMS shall be encrypted and hosted remotely from the JBPU facility.
  - e. Unlimited pages, layouts
  - f. HTML access for advanced users

- g. Version Control including roll backs to any previous state
- h. 24/7 Support
- i. Emergency and standard banner notifications (scheduled posting and removals)
- j. Freedom of Information Act (FOIA) compliance with non-destructive deletions
- k. New page templates that align with overall site
- l. Social Media Integration
  - i. Post to Social media from news feed on website
  - ii. Live Twitter, Social Media updates on website.
- m. Automatically updated links/references when a file is updated
- g) Search Engine Optimization
- h) Multiple language translation
- i) ADA compliance and WCAG compliance
  - a. With meta data including alternate text for all images.
- j) Integrated Calendars
  - a. Preferred integration with Outlook
  - b. Multiple calendars with different permission levels
  - c. File attachments and rich multimedia
  - d. Embeddable in site with various views
  - e. Community calendar (with approval process)
- k) Built in search functionality
- l) Built in website analytics
- m) Minimum 8 Hours (online or in person) CMS training for JBPU Staff
- n) Online Form Creation and customization
- o) Site Map/Site Index
- p) Site based search engine

### Optional Functionality

The following functionality is optional to this component. Functionality that can be delivered by the Firm either as included in the base price or with appropriate price adjustments shall be noted in the Firm's proposal. The options are in no particular order.

- a) Microsoft single sign on and/or LDAP compatibility
  - a. For staff CMS access to manage site
  - b. For staff to access data from utilities existing Microsoft Sharepoint intranet
- b) Integrated forms and data collection directly into JBPU database
- c) Integration with existing Microsoft Sharepoint intranet
- d) ESRI GIS/Portal integration and mapping controls
- e) Bid Document control tools to enable the utility to receive competitive bids electronically
  - a. Submitted bid documents need to be inaccessible by staff until opening date/time
  - b. Submitted bid documents need to be secured with positive submission information for JBPU and potential bidders.
- f) Live Chat for our customers with our service representatives
- g) Work flow integration with existing Sprypoint "mobile work order" system

- h) CISCO UCCX version 10.X integration for phone wait time
- i) FAQ management
- j) Assessment tools to evaluate reading level of site content

### General Process

The following process is generally envisioned for the project:

- a) Kick-off meeting with selected Firm.
- b) Firm to develop wireframes using kickoff meeting, research, and interviews
- c) Meeting with JBPU and Firm to choose best wireframe(s) to pursue
- d) Firm to develop Photoshop renderings/rough drafts of site layout
- e) Meeting with JBPU and Firm to choose desired option
- f) Firm to use mostly existing content but will reorganize information to enhance navigation and user experience (with some content changes provided by JBPU) to develop a functional website in the style of the photoshop/wireframe renderings
- g) JBPU to assess functionality/design and Firm to make changes
- h) Firm to implement training for JBPU Staff
- i) Firm and JBPU to test design to make sure there are no issues prior to release
- j) Firm to finalize changes and publish

### Milestones

The following milestones are expected to be met however a faster timeline is also acceptable. The Firm's proposal must include a detailed schedule listing all key activities to be performed under this RFP in order to achieve the timeline milestones.

<b>Date</b>	<b>Milestone</b>
05/01/2018	Project kickoff Meeting
06/01/2018	Wireframes and photoshop renderings complete
07/02/2018	Prototype Reviews Complete
08/01/2018	Functionality of Website Complete
09/03/2018	Content of website in place, testing ongoing
10/01/2018	CMS training for JBPU by Firm
1/1/2019	Website online, old website offline

### 3) Component B Proposal “Customer Portal”

The “Firm” shall provide all the necessary resources to design, implement, and host a customer portal for the Jamestown Board of Public Utilities (“JBPU”) including the artistic and technical skills needed for a project of this scope. The firm will provide all software integration tools and expertise needed to integrate with the existing resources at JBPU including Microsoft Dynamics GP 2016 R2, Cogsdale’s CSM (V16)(CIS), Sprypoint “mobile work order” system, Invoice Cloud, and ESRI GIS Portal.

The Firm will be responsible for any digital graphics and/or digital media necessary (excluding high resolution photos for banners). The firm will create the necessary data connections, tables, and secure links to leverage existing data sources at JBPU.

#### Required Functionality

The following functionality is required to be implemented by the Firm. Any exceptions should be explicitly noted in proposals. The site requirements are in no particular order.

- a) Mobile friendly Customer Portal
- b) The portal will enable secure access for customers without creating any security exposures for JBPU internal systems. All systems will use the latest encryption and security best practices.
- c) Emergency and standard banner notifications (scheduled posting and removals) for users when they log in (and the ability to segment those notifications based on CIS data.)
- d) Multiple language translations
- e) ADA compliance and WCAG compliance
- f) Enable customer demand side management and self-services including
  - a. Graphics showing usage and billing patterns with multiple views including on/off peak kw/kWh, daily, monthly, yearly patterns, heating/cooling degree days, etc.
  - b. Enable form/data submissions through customer accounts. Enable customers to monitor status of submitted forms including energy efficiency programs/rebates
  - c. Enable customers to change their contact information (with a BPU approval process to prevent erroneous data from being entered.)
- g) JBPU customer service should be able to have the same view as the customer to enable customer help when they use the portal
- h) Instant messaging for users within the portal to enable customer service to answer questions regarding a customer’s account.
- i) Access to metrics of customer account status including communication tracking, form submissions, number of log ins by customer, time spent in the portal, and identification of those that have or have not seen the notification banner(s).
- j) The ability to notify customers through the portal/SMS/email based on JBPU identified segmentation for emergencies, new programs, etc.
- k) Social media integration for customers to share their energy efficiency progress.
- l) Outage reporting functionality for customers to report outages/partial power/flickering through their customer portal and monitor the status of the complaints
- m) Smart metering (AMI, AMR) integration for water and electric metering
- n) Weekly recyclable and garbage pickup information; water flushing day; based on JBPU schedule and their service location (enabled through ESRI GIS portal)

- o) System will be hosted off site and shall have backup and roll back functionality.

### Optional Functionality

The following functionality is optional to this component. Items that can be delivered by Firm shall be noted, and those items that have additional costs to implement shall have listed the price increases. If the firm cannot deliver these options it should also be noted. The options are in no particular order.

#### Integrated forms and data collection to JBPU tables/databases

- a) Integration with existing share point intranet
- b) Work flow initiation directly from online customer forms into "Sprypoint "mobile work order" system"
- c) Customer Notifications through portal, SMS, email depending on their preferences including
  - a. Electric outage (detected by customers meter)
  - b. High water flow, flow data from customer meter but program should identify issues automatically
  - c. Expected discolored water in meter location due to flushing routines
  - d. Boil water alerts
  - e. Peak alerts, account concern updates
  - f. Documents submitted and their status changes
  - g. Customer definable notifications: multiples of normal consumption, rate of consumption changes, leak detection, budget alerts, etc
- d) Rental Owner Property Management
  - a. Legal acceptance by tenant for owner management
  - b. See status of sub accounts
  - c. Transfer accounts to new tenants or revoke accounts
- e) Other customer self service
  - a. Request reconnect
  - b. Requests for balanced billing
  - c. Requests for payment arrangements, extensions
  - d. Request for service disconnects
  - e. High bill inquiries
- f) New service agreements and account creation process (integrated with Sprypoint Mobile Work)
  - a. Electronic signatures and document collection
  - b. Financial standing check and deposit collection if required
- g) Enable customers to compare their energy/water usages to JBPU's "Average" customer in their class and/or similar sized facility compared to national averages
- h) Generate billing estimates for current period's consumption
- i) Enable customers to view multiple accounts of theirs with one logon
- j) Collect customer complaints/concerns within the portal for JBPU personnel to respond to directly including secure customer communications
- k) Display time of use pricing
- l) Back flow prevention testing submissions
- m) Show net metering information
- n) Control demand response appliances/set up demand response/pricing preferences

- o) Manage electric vehicles
- p) Show energy efficiency effectiveness

## Process and Schedule

### General Process

The Firm's proposal must include a detailed schedule that lists key activities to be performed under this RFP in order to achieve the timeline milestones. In developing responses to this RFP note that the following process is generally envisioned for the project:

Kick-off meeting with selected Firm, analysis of existing systems

Firm to develop wireframes of interface(s) using kickoff meeting, research, and interviews

Firm to develop Photoshop renderings/rough drafts user interface

Firm to integrate into JBPU systems to leverage existing data

JBPU to assess functionality/design/test and submit changes

Firm to finalize changes, go live, and provide support to issues

### Milestones

Date	Milestone
06/01/2018	Project kickoff/discovery Meeting
08/01/2018	Research complete, Submit interface design for approval
10/01/2018	Data integration complete, submit interface for testing
1/1/2019	User portal online and complete.

## 4) Proposal Instructions

### Submission Requirements

The scope of work, descriptions, and deliverables listed above are not intended to comprehensively detail every aspect of the Project. The respondent's proposal should provide specific information on how it proposes to provide the JBPU with a package of services tailored to the work involved including sufficient detail to enable the JBPU to evaluate the Firm's ability to advance the overall Project beyond the work initially included. The respondent's proposal should include the following table and associated submission requirements:

Vendor: \_\_\_\_\_

	Component A Only	Component B Only	Component A & B
Project Cost			
Hosting Cost/Month			
Other Fees			
Hosted By			
Platform			
Start Date			
Completion Date (Attach Schedule)			
Include attachment for optional features included in base price			
Include attachment for exceptions to required content that cannot be provided by Firm			
Include attachment for optional features not included in base price and their respective costs if they could be implemented by the firm (one-time and/or monthly)			
Description of similar projects completed by Firm within last five years including references with contact names, phone numbers and e-mail addresses.			
Organizational chart listing of the primary individuals who will be assigned along with resumes and similar project experience.			
Detailed breakdown of hourly billing rates and fees for additional work including travel, food, lodging, equipment, supplies and other support services as necessary.			



## Deadline

The proposal deadline is **10 AM EDT Monday April 16, 2018** and proposals must be submitted via e-mail to [brobbins@jamestownbpu.com](mailto:brobbins@jamestownbpu.com) by that time.

## Contact Information

Questions and proposals should be directed to Becky Robbins through the contact information listed below. E-mailed questions followed by a phone call (if necessary) is preferred.

Becky Robbins  
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