

## **Berkshire Benchmarks Website RFP – Additional Questions and Answers – 9/27/2021**

Q. I just want to reconfirm the sections to be included and sent in the proposal are the following:

- Bid Pricing Sheet
- Reference Form + project description and samples of work
- Certificate of Non-Collusion
- Non-price technical proposal

Could you let me know if there are any other relevant sections to be included in the formal proposal?

A. you are correct – the four items you have listed are what needs to be submitted.

Q. Is there a need for physical/hardcopy of the proposal or is soft copy of it is fine?

A. Per Massachusetts procurement laws, proposals must be hard copy.

Q. It looks like you have a preference for a wordpress content management system. Will you entertain other CMS technology or are you married to wordpress?

A. While Wordpress is preferred due to staff familiarity, we are open to other CMS technologies if it can be justified.

Q. What is the technology you are using for the Data Clearinghouse functionality and Regional Indicators?

A. For the regional indicators, Tableau is being used. For the data clearinghouse, we are looking to the website vendor to propose a solution. It can be a custom database or Tableau.

Q. Are their 3<sup>rd</sup> party vendors involved with the Data Clearinghouse & Regional Indicators or are you handling that internally?

A. We are handling this internally.

Q. How many staff members currently make changes to the website? How many will require training on the new solution?

A. At this time, only one staff member is making changes. Only one training will be required.

Q. Do external data sources (e.g. Census Bureau, Mass DOE, etc.) provide APIs for us to consume their data?

A. Some of the external data sources may provide APIs, but I do not know which ones for certain.

Q. If so, how many data sources?

A. Out of 4 or 5 common data sources, maybe 2 or 3 may already have APIs.

Q. If so, do you expect us to develop these integrations into Tableau / table structure?

A. That would be great.

Q. If not, how will this data be refreshed yearly (or on regular cadence)?

A. Currently, data is manually imported into the data clearinghouse a few times a year through Excel.

Q. We understand that there are WCAG requirements for this project. Do you need Level A, AA, or AAA compliance?

A. AA compliance is sufficient.

Q. Are there any SEO requirements for the new website?

A. No SEO requirements.

Q. Do you need training documentation or just training for your staff?

A. Basic training documentation is good.

Q. How many trainees?

A. 1

Q. We see the current website is integrated with Google Analytics. Can you confirm that this will continue into the future?

A. Yes

Q. Are there other such integrations that we should know about?

A. The only integration is with Tableau.

Q. We noted that "Written responses will be emailed to all bidders on record..." By emailing you today, is my address now on record?

A. Yes

Q. For proposal delivery, I wanted to confirm that proposals can only be delivered by mail and not as a PDF via email.

A. That is correct. Proposals must be mailed.

Q. In terms of branding, we understand that you will be provided a brand guide for the overall branding requirements for the new web design as well as additional branding direction and assets, currently being developed under another contract, for the web design vendor to use to design the actual Sectors section web pages?

A. Correct. The overall branding guide is included in the RFP.

Q. Are you open to moving the Data Clearinghouse search tool to the site homepage (as well as keeping the tool on it's on page in the navigation). If the user searches from the homepage they would return a result in the Data Clearinghouse section.

A. That works for us.

Q. Will all the features and contents types from the current website exist on the new site?

A. The data clearinghouse will act similar to what it does not. The Regional indicators is being reworked and will now involve Tableau instead of links to pdfs. We do not need Partners, as that can be in About. There should be a publication page. Announcements does not need to be a stand alone page, but can be a short term popup on the home page.

Q. Will any features or content types be removed? Will any new features or content types be added? If so, please describe which features and content will be removed or added?

A. The interactive map is the only unique content type that is not needed at this time.

Q. Are there any improvements you would like potential vendors to be aware of to existing features that you would like to address during the project?

A. The UX for the data clearinghouse needs to be improved.

Q. Are there any issues with the current sites' design or functionality you would like potential vendors to be aware of that you would like to correct in the new version?

A. The UX for the data clearinghouse is a challenge for some people. In terms of back end, it is very hard to find a data point in the data clearinghouse to make a change (numbers were revised, source web address was changed, etc.)

Q. For the Sectors sector you would like "Links to up to 12 indicators" and "Indicators will be presented in a Tableau Online format". Are users linking to somewhere else on the site or another website to view indicators? Or will indicator data be displayed within the Sectors section?

If possible, can you provide additional detail around this requirement?

A. The Tableau pages will be through Tableau Public, which can be stand alone or can be integrated into the website. Given the number of indicators, I do not see them all fitting on one webpage, but linking to either the stand alone Tableau page, or linking to a Berkshire Benchmarks page that has tableau public embedded within it (preferred option to keep branding consistent).

Q. For the Sectors sector you state that “Survey results - A survey will be conducted on the region, and results will be organized by topic area. This will also feature narrative.”

If possible, can you provide additional clarification on this feature. For example, what types of data or survey results are there? How many results might exist for each topic? How many topics might there be per Sector. Will results and topic types be consistent across Sectors?

A. The survey will be asking 3-5 questions per sector. Each question will have a few sentences on the results.

Q. For the Reports Repository, where users will find “community and regional reports”, you state that “The page will need an organized list of links”. Will this section be a repository of links to reports or will the report physically exist in this section? If the latter, which types of documents will exist in this section and what actions will users be able to take, such as download or view?

A. Having copies of the reports physically in the section would be the preference, but some may be links. It is anticipated that these would be pdfs and the user would have the ability to download them.

Q. User Roles / Permission: If possible, can you provide more information on the different roles and responsibilities of CMS users?

A. An administrative role with full access as well as an editor role with the ability to edit content, upload data, but not make structural changes.

Q. Are there any CMS/database specific publishing workflows we should be aware of and required to implement? i.e. review / approval processes.

A. None

Q. If you decide to continue with your current hosting provider, are there any technical requirements or limitations we should know about the hosting environment (i.e. any Proxy servers to be aware of, specific versions / flavors of PHP/Apache/MySQL that are required, etc)?

A. I am not aware of any. We are deferring to the developer to offer a hosting solution.

Q. If you plan to continue with your current hosting provider, can the hosting environment support any/all these services: Redis, Solr, Varnish?

A. I do not know. We are deferring to the develop to offer a hosting solution.

Q. We will also provide a quote for hosting the new website. Can you provide site traffic statistics, such as average monthly sessions and page views? If available, stats on average monthly bandwidth and periodic traffic spikes, if any, would be helpful, but not required.

A. We currently have about 200 users/month. I do not know bandwidth or traffic spikes.

Q. Would you be able to provide any budgeting information / requirements that you have for the project?

A. The maximum budget is \$75,000.

Q. How are you currently retrieving data from remote data sources (data that is accessible in the data clearinghouse)? Please list any / all API's, SDK's, etc currently in use to retrieve such data.

A. Currently, data is being manually downloaded from remote data sources, processed in Excel, and uploaded to the data clearinghouse.

Q. Can you provide a list of remote data sources you are retrieving data from to centrally store onsite?

A. Manually, we retrieve data from the following:

- <https://data.census.gov/cedsci/>
- [https://profiles.doe.mass.edu/state\\_report/](https://profiles.doe.mass.edu/state_report/)
- <https://www.countyhealthrankings.org/>
- <https://www.bankerandtradesman.com/>
- <https://www.mass.gov/find-unemployment-rates>
- <https://www.mass.gov/service-details/municipal-finance-trend-dashboard>
- <http://www.fbi.gov/hq/cjisd/cjis.htm>
- <https://www.irs.gov/statistics/soi-tax-stats-individual-income-tax-return-form-1040-statistics>

There are other data sources we use as well, but for only a couple of data points.

Q. Can you provide examples of similar reporting engines / sites that do a better job at providing tools your users are looking for in the data clearinghouse section of the site?

A. The Data Common <https://datacommon.mapc.org/> has a similar feel for what we are looking for in the Data Clearinghouse.

Q. Does the existing website currently integrate with Tableau and if so, can you provide more details about the integration? Are you looking to use tableau as the reporting / visualization engine?

A. No it does not.

Q. Can you provide screenshots or more details about what is currently housed in your Tableau account and how you envision the integration to work?

A. Our current tableau account is under development and we do not have any

Q. Do you envision using tableau as the "source of truth" as it pertains to data featured on the data clearinghouse section or is it required to be housed on the website database?

A. The data clearinghouse can use either Tableau or it can be housed within a website database. We are looking for options from the developer.

Q. Can you provide approx how many GigaBytes of data is housed in the current website, specifically as it relates to the data clearinghouse section?

A. I am unable to access this information.

Q. If available, please provide the current Berkshire Benchmarks website traffic volume and which Nexcess plan the Berkshire Benchmarks website currently subscribes to.

A. The current website traffic is about 200 users/month. I do not know what Nexcess plan as our existing developer pays for it.

Q. Is the exportable data requirement described on page 7 of the RFP similar to the current data export results delivered via data search on the Data Clearinghouse page?

A. Yes

Q. Is Tableau integration a requirement or an option? That is, would BRPC be open to other solutions?

A. For the indicators, Tableau is the requirement. For the data clearinghouse, we are open to other solutions.

Q. Is embedding data collection via an iFrame for display a viable option using Tableau?

A. Yes

Q. Who would be responsible for setting up the addition of new 3rd party data sources?

A. We would work together to figure out the integration of 3<sup>rd</sup> part data sources. BRPC does not have the stand-alone knowledge to do this.

Q. Regarding the automation of the importing of data into the database directly from source sites: Is there an API or multiple APIs that you recommend we review?

A. We do not know if our data sources have APIs, but here are some of the bigger sources we use:

- <https://data.census.gov/cedsci/>
- [https://profiles.doe.mass.edu/state\\_report/](https://profiles.doe.mass.edu/state_report/)
- <https://www.countyhealthrankings.org/>
- <https://www.bankerandtradesman.com/>
- <https://www.mass.gov/find-unemployment-rates>
- <https://www.mass.gov/service-details/municipal-finance-trend-dashboard>

Q. Do you have any specific requirements in mind for collecting, receiving, and compiling survey data? Do you have a service in mind for delivering survey popups?

A. For the survey pop-ups within the website, we do not have a service in mind. We also have a regional survey that is being developed, but only the results will be posted online in the Regional Indicators section. These results will be a few sentences for 3-5 questions per sector.



Q. Can we assume that the “search and find” for dead links refers to pages within the site?

A. Yes

Q. Web Content Accessibility Guidelines 2.0 come in three levels: A, AA and AAA. What level of compliance is required?

A. AA is sufficient

Q. Please describe the goal/purpose of designing the homepage so that everything resides “above the fold” in the top screen of the window?

A. We are open to suggestions, but the intent was to minimize scrolling. While society has gotten used to scrolling on cell phones and tablets, there are some people who still struggle with it on desktops.

Q. In the RFP it states that the current website “no longer meets the region's needs.” Can you provide any further specificity about the key areas where the existing website is deficient, and which you hope the new website will address?

A. The current website is deficient in the indicators section in that it does not allow us to present anything more than a pdf file. We have also been challenged with the Ux of the data clearinghouse, and the backend, which is in Expression Engine, and does not allow us to change anything or to easily find records within the data clearinghouse that may need to be changed.

Q. What pages are we keeping and not keeping from the current website? Are there any new pages that will be added for the website redesign?

A. None of the content, outside of the data clearinghouse needs to be moved. All pages on the new website will have new fresh content.

Q. In addition to the information provided by the RFP, could you tell us about any other goals and problems that you are trying to meet and solve with this website?

A. There are several goals we are trying to solve with the new website. First, we want a new, fresh look for Berkshire Benchmarks as we are trying to focus more on the Regional Indicators than previously. Secondly, we want to improve the user experience in the data clearinghouse. Third, we want to improve the backend maintenance of the website – managing the pages, uploading data, changing data.

Q. How are people currently solving those problems mentioned?

A. The first goal is new, the second goal is currently being managed by users struggling through finding what they want and not efficiently using their time. The third goal is being solved at this time through manual labor.

Q. What would you expect users to do on the website?

A. We would expect users to do one of two things. One - review the indicators to see how they are impacted by the work the community organization may do, and two – access the data clearinghouse to get data they need.

Q. What do you currently know about your key users? How did you gather this information?

A. Most of our users are local community organizations, municipalities, colleges and school districts. We know this based on training we have done and feedback we have received. Others may be using it, but we are not aware of it.

Q. What would you prioritize as the top 3 requirements that must be done first for the website?

A. The top three items are the homepage design, the UX and database decision for the data clearinghouse, and the Sector page design.

Q. Will you need the proposal to include services to help with initial migration of content into the new website?

A. The only thing that may need to be migrated is the data clearinghouse – everything else is new content. Our preference is to have the vendor migrate the data clearinghouse to the new site, if using a database, or assist with the migration if using Tableau.

Q. Do you have to be registered in the state Massachusetts?

A. No

Q. Will interviews be virtual or in-person?

A. Virtual

Q. What is inon? The word is listed here: Each sector will have its own inon and page color aligning with the branding guide (currently being developed via another contract and will be delivered by the time this solicitation is awarded).

A. Apologies. It should say icon.

Q. Can we include bios and case studies?

A. Absolutely

Q. Should we include a cost breakdown or just the lump sum?

A. Lump sum, with a cost breakdown on a separate sheet would be preferred.

Q. In the RFP you mentioned "The site should integrate with social media and easily allow the Berkshire Benchmarks to post to social media from the website." Could you please provide more clarification about this detail? Are you referring to adding a share social media share feature similar to what is found on a blog post?

A. Yes, we want to be able to click a link and share it on our social media accounts.

Q. In the RFP you mentioned, "Survey results - A survey will be conducted on the region, and results will be organized by topic area. This will also feature narrative." What does narrative refer to here?

A. Each sector will have 3-5 questions on the survey. There will be a few sentences on the results of each specific question in that sector.

Q. In the RFP you mentioned "Upon completion of the contract, the website needs to be fully editable by the BRPC, including style sheets, text, layout, and design." Is there someone on the team who has knowledge of editing CSS?

A. A few people have minor background editing CSS, but we do not plan to do this unless needed. However, we want to ensure that if we need to switch vendors in the future, we would not lose the ability to edit the style sheets.

Q. Can we use subcontractors?

A. Yes

Q. Do you want the lump sum cost written in words?

A. Yes

Q. Would you all like for us to include some small website changes within the maintenance plan or just website updates?

A. Provide website updates as part of the RFP, but then provide a rate for additional changes.

Q. In the RFP, you mentioned "The website consultant will develop a minimum of three (3) alternate home page designs illustrating distinct layout options for the BRPC to consider." Will you need layout planning for the inner pages or will we be using a similar layout based on the finalized homepage?

A. A similar look and feel will be used for the additional pages, but some customization to the layouts (especially the indicators) will be needed.

Q. Does the BRPC have a comprehensive list of public datasets they currently access or would be importuning or linking to?

A. The major datasets that we use are:

- <https://data.census.gov/cedsci/>

- [https://profiles.doe.mass.edu/state\\_report/](https://profiles.doe.mass.edu/state_report/)
- <https://www.countyhealthrankings.org/>
- <https://www.bankerandtradesman.com/>
- <https://www.mass.gov/find-unemployment-rates>
- <https://www.mass.gov/service-details/municipal-finance-trend-dashboard>

Q. The BRPC Mentions the Census as an external source. The most secure “automated” way to access external data sources is through an Application Programming interface (API). <https://data.census.gov> has a multitude of available APIs for data sources. Does the BRPC have a list of publicly available datasets they will want to pull data from?

A. see above

Q. Can the BRPC Provide a sample of the Expression Engine database table(s)

A. this is the table we use to import data into Expression Engine.

Name	Topic ID	Geo ID	Year	Value	Value Type	Source	hyperlink
Housing Occupied Percent Adams 2009	14516	4	2009	89.8	Percentage	US Census ACS 2005-2009	<a href="http://factfin">http://factfin</a>

Q. The regional indicators will track progress on approximately 80 indicators, which address various issues in the region. The regional indicators portion of this program will provide the analysis and benchmarking needed to understand how the region is performing and whether our actions and choices are bringing us closer to or further away from where we want to be. What are the data sources for the ~80 regional indicators?

A. Most of the data sources are the ones listed above. We are still finalizing some of this data, so I do not yet have a comprehensive list of sources.

Q. Does the BRPC anticipate the data management and integration of these regional indicators will be the basis for the new database where the reports and public interactions will be generated from.

A. These indicators will be included in the Data Clearinghouse database, but there will be other data that is not an indicator, but in the data clearinghouse. As the indicators will be in Tableau, they do not need to be linked to the data clearinghouse as source data.

Q. What is your budget for this project?

A. Maximum of \$75,000

Q. For the separate pricing sheet, does it need to be mailed separately, or only put into a separate sealed envelope in the same package as bid?

A. It can be mailed together, but in a separate sealed envelope in the same package.

Q. Can we include a breakdown of the costs included on the Bid Pricing Sheet in the main proposal response, or are we limited to the Bid Pricing Sheet? Or if we can include a breakdown of costs, does it need to be kept in the separate sealed envelope?

A. On the Bid Pricing Sheet, include the lump sum total. You may include a second sheet with a breakdown of costs. The breakdown of costs needs to be in the separate sealed envelope.

Q. On the Bid Pricing Sheet, where it says "written in words," is that where we include a breakdown of costs, or is this field intended for something else?

A. This is just for writing the cost in text, rather than in numbers.

Q. What is the anticipated start date for the project to begin?

A. November 1, 2021

Q. Is there a specific event or requirement that is driving a go-live date of April 1, 2022?

A. We are hoping to have a public event in April to reveal the State of the County report and the new website. This date may slide a bit, but not more than a month.

Q. We understand that BRPC is open to switching to a new hosting provider. In order to better recommend an environment for BRPC, could you provide traffic details for the current site? (E.g., number of daily/weekly/monthly visits)

A. Approximately 200 users/month

Q. Is BRPC open to working with a digital firm located in the Washington, DC/Maryland area?

A. Yes

Q. Does BRPC have 2-3 websites that it admires or is inspired by in terms of look and feel, navigation, functionality, etc.?

- <http://www.thinkhealthstl.org/> <https://mapazdashboard.arizona.edu/>
- <https://www.dhealthmatters.org/index.php?module=indicators&controller=index>
- <https://www.impactessexcounty.org/>
- <https://datacommon.mapc.org/> is organized well for data clearinghouse

Q. What is the expectation for mobile users with regard to rendering of Tableau data?

A. Tableau has limitations on mobile devices, so users will have to scroll around the screen to see everything; however, any suggestions from the vendor on ways to better utilize Tableau will be appreciated.

Q. What are your accessibility expectations as it relates to Tableau?

A. We have not considered this. Advice from the vendor on making the Tableau pages accessible would be appreciated.

Q. Can we base our estimates on the assumption that the current columns (Topic, Geography, Year, Value, Source) for the data clearinghouse?

A. Yes

Q. What is the frequency of updates from third-party data you would like automatically imported into the system?

A. As needed

Q. When you say, "We continually expand the data we collect, so if the vendor includes the importation of data into the new database, it needs to be customizable on our end," does that mean

that you do not desire an automatic ingestion of data, just an automatic processing and formatting of data you manually load to the system?

A. We would prefer an automatic ingestion of data, but are open to manually loading (which is what we currently do). The intent of this statement was that we occasionally find new datasets that we want to include, so there needs to be a plan for how those get included.

Q. How frequently will data be added to the system?

A. New data – as needed. Depends on the data source – most are yearly.

Q. If Tableau is utilized for the Data Clearinghouse, is the expectation that each query will still have a unique URL in the WordPress site?

A. Each query will not need to have a unique url. Initial thoughts would be several Tableau pages that would allow us to customize the geography/year/subject.

Q. How are the dynamically graphs currently rendered and what are the specific "must have" aspects of this part of the Data Clearinghouse for the new site?

A. The current graphs are generated dynamically through an Expression Engine add-on, but I do not know the specifics. The must haves for the data clearinghouse are the data tables and the ability to export. Having graphic capabilities is nice, but not required.