

## RFQ ATTACHMENT V – RESPONSE TEMPLATE

Respondents are required to provide responses using the following template

### SECTION 1 – FIRM QUALIFICATIONS

#### 1.A - COMPANY PROFILE SUMMARY

**INSTRUCTIONS:** Provide a quick company overview by filling out the required information on the Response column (B) in the table included below.

A. REQUIRED INFO	B. RESPONSE
1. Year Company was founded	Founding Year: 2009
2. Top 3 Areas of Expertise	Expertise: Drupal, WordPress, PHP
3. Number of Years delivering Drupal solutions	Years (#): 5
4. Number of Employees	Employees (#): 1
5. Number of Active Projects	Projects (#): 5
6. Company Structure – Public or Private	Structure: Private
7. Revenues generated last fiscal year	Revenues (\$):\$75,000
8. Profitable last fiscal year ( yes / no)	Profitable (yes/no): yes
9. Active Relevant Company Certifications	Certifications: LBE, SF Green Business and City Vendor

**1.B - COMPANY CORE EXPERTISE**

**INSTRUCTIONS:** *Provide below a brief overview of your company and areas of expertise that best demonstrates your ability to support the needs of the Service Area(s) to which you are responding.*

Champsee Solutions helps organizations deliver on their mission while serving their clients, customers, and stakeholders in the best possible ways.

We speak two languages, tech and non-tech.

So whether we're helping an executive or an in-house programmer, we understand what needs to happen, communicate clearly, and deliver outcomes that take projects to the next level.

We have been working with Drupal for over 5 years on projects that involve theming, site building, custom development as well as maintenance and support. We work on projects that are "soup to nuts" where we start from a blank slate and deliver a functioning website. We also work with organizations with in-house Drupal developers and offer expertise that they don't have in-house.

**1.C - COMPANY DELIVERY METHODOLOGIES**

**INSTRUCTIONS:** *Explain below the processes, practices and methodologies that your firm plans to leverage to deliver services to each individual City department that elects to engage with your services.*

We generally follow the Agile methodology. We will start an engagement by getting together a wish list of items from the client. We will then look at which items make the most sense to work on first. We will consider factors such as what is most impactful to the organization, what is "low-hanging fruit", availability of expertise on both the client and contractor side, etc.

**1.D - KEY DELIVERY PERSONNEL**

**INSTRUCTIONS:** *Provide below a brief paragraph describing the key experience of the top 3 key Service delivery (non-executive) personnel that is responsible for delivering services to customers.*

Manish Champsee, founder of Champsee Solutions has worked in the tech industry since the late 1990's. He worked as a project manager, web developer, and computer programmer for cutting-edge internet technology companies. It was through working with a variety of design, financial, and small businesses that Manish started Champsee Solutions. In 2008, Manish began providing best-in-class web solutions for small start-ups to large multi-national corporations. He has worked with a range of clients including EMC, UCSF, JS Sullivan Development, Metropolitan Transportation Commission, UC Berkeley, Oddball Films, San Francisco Lawyer's Network and Transform.

For more than 15 years Noah Biavaschi has been starting and consulting businesses, as well as working for both government and non-government organizations to deploy Open Source Software in business critical systems. Mr. Biavaschi has served clients on nearly every continent—having worked on projects as diverse as using remote sensing to help save endangered birds & mammals, to guiding organizations such as a national football association and a major university through a complex technology upgrades, just to name a few.

Seth Augustus Quittner is graduate of MIT (Course IVB, Media Lab) He runs his own SF-based web design and development company, serving as a designer, front-end developer and project manager. He has done numerous projects over the years, focusing on small and mid-sized businesses and organizations.

**1.E - KEY PROJECT REFERENCES**

**INSTRUCTIONS:** Provide 3 key references and related points of contact from recently completed engagements where your company delivered Drupal solutions – fill out 3 tables below.

REFERENCE # 1	REQUIRED RESPONSE
<i>Customer Company Name</i>	UCSF Center for HIV Information
<i>Drupal solution delivered</i>	Custom Drupal Development
<i>Completed on</i>	October 9, 2015
<i>Project Duration</i>	2 months
<i>Key Benefit Delivered</i>	Gives AIDS practitioners custom recommendations based on filling out a survey
<i>Customer Contact Name</i>	Nicolé Mandel
<i>Customer's Contact phone</i>	(415) 575-0502
<i>Customer's Contact email</i>	nicole.mandel@ucsf.edu
<i>Customer Company Location</i>	UCSF Mission Bay, San Francisco

REFERENCE # 2	REQUIRED RESPONSE
<i>Customer Company Name</i>	Transform
<i>Drupal solution delivered</i>	Drupal Theme and custom development
<i>Completed on</i>	Ongoing
<i>Project Duration</i>	1 year
<i>Key Benefit Delivered</i>	Rapid changes to site as needs evolve
<i>Customer Contact Name</i>	Jenn Lavelle
<i>Customer's Contact phone</i>	(510) 740-3150 ext 310
<i>Customer's Contact email</i>	jlavelle@transformca.org
<i>Customer Company Location</i>	Oakland, CA

REFERENCE # 3	REQUIRED RESPONSE
<i>Customer Company Name</i>	San Francisco Lawyers Network
<i>Drupal solution delivered</i>	Drupal Theme and custom development
<i>Completed on</i>	Oct, 2015
<i>Project Duration</i>	3 months
<i>Key Benefit Delivered</i>	Communicate benefits of joining organization
<i>Customer Contact Name</i>	Walter Haynes
<i>Customer's Contact phone</i>	(415) 576-1500
<i>Customer's Contact email</i>	walter@stoll-law.com
<i>Customer Company Location</i>	San Francisco

## SECTION 2 – MINIMUM QUALIFICATIONS

### 2.A - MINIMUM QUALIFICATIONS FOR ALL SERVICE AREAS

**INSTRUCTIONS:** Fill out table below by inserting a “Yes” or “No” in every cell adjacent to each Minimum Requirement. In order to be considered for inclusion in the list of qualified firms, a Respondent must respond with a “Yes” to all of the Minimum Requirements.

### MINIMUM QUALIFICATIONS FOR ALL SERVICE AREAS WORKSHEET

No	Requirement	Yes / No
1	Respondent has minimum of 3 years of experience providing Drupal related services.	Yes
2	Respondent agrees that the City’s Department of Technology in its position to safeguard the City’s shared Drupal web content management environment will have to review and approve any agreement between a pre-qualified contractor and a City agency prior to execution.	Yes
3	Respondent will leverage the City’s standard electronic payment services as selected by the City’s Treasurer and Tax Collector Office rather than promote or offer alternatives for the purpose of building any online payment functionality.	Yes
4	Respondent agrees to comply with the City’s security guidelines and agrees solutions will not be deemed acceptable until an audit is completed and any related critical security recommendations are fixed prior to final delivery.	Yes
5	Respondent agrees disclose and include in any agreement entered with a City agency the ongoing support efforts, costs and requirements to properly maintain any custom solutions.	Yes
6	Respondent will execute a best practices service level agreement for highly customized solutions developed to meet the unique needs of specific City agencies.	Yes
7	Respondent will deliver all related user and technical documentation to City agency staff.	Yes
8	Respondent will ensure any solution will comply with the City’s accessibility standards (as outlined by Federal Section 508) whenever applicable.	Yes
9	Respondent will test all solutions jointly with the City department staff before they are made available to the public.	Yes

**STOP:** If you answered “YES” to all of the Minimum Requirements above, please proceed to the next sections and provide responses to the below questions relevant to your proposal in order to complete your submission. If you

answered “NO” to any of the Minimum Requirements, please stop; your firm will not be considered for qualification in any of the Service Areas.

**2.B - DECLARE INTENT TO BE QUALIFIED FOR ANY SERVICE AREAS**

**INSTRUCTIONS:** For the Service Area or Areas for which your firm is submitting a proposal, each Respondent should indicate in the table below its intent to be a qualified vendor by placing a “Yes” in the “Qualified” column below associated with the related Service Area.

**IMPORTANT:** Please note that in addition to satisfying the minimum qualifications common to all service areas (see previous section 2.A); Respondents must demonstrate expertise in at least one of the following Service Areas.

Number	Service Area	Qualified (Yes/No)	If Qualified Fill out Section
1	Drupal theme design services	Yes	2.C
2	Drupal custom development services	Yes	2.D
3	Drupal custom hosting and support services (for highly customized solutions)	No	2.E

Respondents seeking to be become a qualified vendor in a specific Service Area must also fill out and meet all the minimum qualifications in the following specific section(s) related to the service areas for which they indicated, in the above table, to be a “Qualified” vendor.

**2.C - MINIMUM QUALIFICATIONS FOR SERVICE AREA 1**

**INSTRUCTIONS:** Insert a “Yes” or “No” in every cell adjacent to each Minimum Requirement. In order to be considered for inclusion in the list of qualified firms for this Service Area, a Respondent must respond with a “Yes” to all of the Minimum Requirements.

**IMPORTANT:** Only respondents seeking to become a qualified vendor in **Service Area 1 (Drupal Theme Design services)** must fill and meet all the following minimum qualifications.

No	Requirement	Yes / No
1	Respondent has minimum of 3 years of experience creating design proposals meant to be specifically deployed on Drupal based solutions.	Yes
2	Respondent has minimum of 3 years of experience delivering theme-based design services and building related theme for Drupal solutions.	Yes
3	Respondent will adhere to the City’s design standards and will use the City’s style guide and patterns library to ensure all City websites use common design elements while leaving City agencies room to promote their unique brands.	Yes
4	Respondent agrees to build themes in compliance with the City’s security guidelines and agrees solutions will not be deemed acceptable until any security recommendations are fixed prior to final delivery.	Yes
5	Respondent has minimum of 3 years of experience creating Drupal theme design solutions leveraging usability best practices.	Yes
6	Respondent has minimum of 3 years of experience creating Drupal theme that comply with the Federal accessibility standards (Section 508).	Yes
7	Respondent has minimum of 3 years of experience creating Drupal theme that are fully responsive to mobile and tablet devices.	Yes

## 2.D - MINIMUM QUALIFICATIONS FOR SERVICE AREA 2

**INSTRUCTIONS:** Insert a “Yes” or “No” in every cell adjacent to each Minimum Requirement. In order to be considered for inclusion in the list of qualified firms for this Service Area, a Respondent must respond with a “Yes” to all of the Minimum Requirements.

**IMPORTANT:** Only respondents seeking to become a qualified vendor in **Service Area 2 (Drupal Custom Development services)** must fill and meet all the following minimum qualifications.

No	Requirement	Yes / No
1	Respondent has minimum of 3 years of experience delivering custom development services for Drupal based solutions based on clearly documented software development and testing methodologies.	Yes
2	Respondent has minimum of 3 years of experience configuring Drupal software in-built functionality to deliver customized Drupal solutions.	Yes
3	Respondent agrees to use the City’s standard Drupal profile when enhancing City departments’ websites leveraging the City’s standard environment and understands that the City’s Dept. of Technology, to safeguard the City platform, has to review and approve any new solution prior to implementation.	Yes
4	Respondent agrees to build custom code in compliance with the City’s security guidelines and agrees solutions will not be deemed acceptable until any security recommendations are fixed prior to final delivery.	Yes
5	Respondent has minimum of 3 years of experience developing custom Drupal solutions leveraging security and engineering best practices.	Yes
6	Respondent has minimum of 3 years of experience developing any custom Drupal component in compliance with the Federal accessibility standards (Section 508).	Yes
7	Respondent has minimum of 3 years of experience creating Drupal solutions and functionality that is fully responsive to mobile and tablet devices.	Yes
8	Respondent agrees include in any agreement entered with a City department the ongoing support efforts, costs and requirements to properly maintain any custom developed Drupal solutions.	Yes
9	Respondent will deliver all related user and technical documentation to ensure City agency staff can fully use and enhance Drupal custom solution.	Yes



**2.E - MINIMUM QUALIFICATIONS FOR SERVICE AREA 3**

**INSTRUCTIONS:** Insert a “Yes” or “No” in every cell adjacent to each Minimum Requirement. In order to be considered for inclusion in the list of qualified firms for this Service Area, a Respondent must respond with a “Yes” to all of the Minimum Requirements.

**IMPORTANT:** Only respondents seeking to become a qualified vendor in **Service Area 3 (Drupal Custom Hosting and Support services)** must fill and meet all the following minimum qualifications.

No	Requirement	Yes / No
1	Respondent has minimum of 3 years of experience delivering custom hosting and support services for highly customized Drupal based solutions on a flexible cloud platform able to satisfy the unique requirements of key City agencies.	
2	Respondent has minimum of 3 years of experience delivering custom hosting and support services for Drupal based solutions in a high availability and fully redundant cloud environment.	
3	Respondent has the ability and experience to deliver and support highly scalable solutions that can accommodate the growing needs of highly customized Drupal solutions for key City agencies.	
4	Respondent agrees to provide support services in compliance with the City’s security guidelines and in accordance with industry security best practices.	
5	Respondent has minimum of 3 years of experience providing support on a 24x7x365 basis for custom Drupal cloud solutions according to a pre-defined service level agreement designed to meet specific requirements of a City agency.	
6	Respondent agrees to include in any agreement entered with a City department the ongoing support efforts, costs and requirements to properly support any custom cloud hosted Drupal solutions to meet specific performance and uptime metrics.	
7	Respondent will be able to deliver custom disaster recovery, business continuity, and security (including response to denial of service attacks) services designed to meet a variety of operational and regulatory requirements specific to key City agencies.	

## SECTION 3 – SERVICE AREA CAPABILITIES

### 3.A - DESCRIBE CAPABILITIES FOR SERVICE AREA 1

**INSTRUCTIONS:** Provide below answers to the following questions demonstrating your firm's technical expertise and capabilities relevant to this Service Area.

**IMPORTANT:** Only respondents seeking to become a qualified vendor in **Service Area 1 (Drupal Theme Design services)** must complete the following questions describing their relevant core capabilities.

**QUESTION 1 -** Briefly describe 1 project showing how your firm consistently leverages best UI/UX practices to deliver high quality Drupal themes and design solutions.

We worked on a project for a legal firm that leveraged best UI/UX practices. We brought in a designer who is well versed in UI/UX practices to work with the client to come up with a design for the site. We have standardized on the bootstrap theme which is what we build our themes upon. This further ensures that we deliver a theme that is consistent with best UI/UX practices. We then installed the theme on a sandboxed Drupal site to allow the client to test as well as offer changes. We use tools like Browserstack to test how the site renders on various browsers.

**QUESTION 2 -** Briefly describe your process and deliverables involved in building themes for Drupal solutions. Focus on how your firm would reconcile the specific design needs of a City agency with a broader set of City enterprise requirements.

Our methodology for delivering high quality themes is fairly consistent through all of the projects that we have worked on. We sat down with the client to drill down at what their needs were, the audience that they were targeting, the goals for the site, etc. We then brought in a designer who is well versed in UI/UX practices to work with the client to come up with a design for the site. We have standardized on the bootstrap theme which is what we build our themes upon. This further ensures that we deliver a theme that is consistent with best UI/UX practices. We then installed the theme on a sandboxed Drupal site to allow the client to test as well as offer changes. We use tools like Browserstack to test how the site renders on various browsers.

**QUESTION 3 -** Briefly describe your process for designing and building Drupal themes that are responsive, mobile friendly and still able to satisfy web accessibility requirements (Federal section 508).

We have standardized on the Drupal Bootstrap theme as a base theme. This ensures that a variety of best practices including responsiveness, mobile friendly and 508 requirements are largely met. Of course, this isn't enough. So we also test on a variety of actual mobile devices as well as using tools like Browserstack to ensure that the site looks good on a majority of browsers and platforms. We generally work with the client to determine which combinations of

OSs and browsers we should test to satisfy budget requirements. We also use [508checker.com](http://508checker.com) to check for 508 compliance.

### **3.B - DESCRIBE CAPABILITIES FOR SERVICE AREA 2**

**INSTRUCTIONS:** Provide below answers to the following questions demonstrating your firm's technical expertise and capabilities relevant to this Service Area.

**IMPORTANT:** Only respondents seeking to become a qualified vendor in **Service Area 2 (Drupal Custom Development services)** must fill and meet all the following minimum qualifications.

**QUESTION 1** - Briefly describe 1 project showing how your firm consistently leverages software development and testing methodologies and best practices to deliver high quality custom Drupal solutions.

We generally work with clients using an Agile methodology. Agile was largely developed with in-house development in mind, though can be easily adapted to a consulting relationship, though some aspects don't make as much sense depending on the nature of the project. On a project for a major local university, we delivered a solution that allowed health practitioners to fill out a self-assessment survey that then provided a list list of recommendations based on the answers to the survey questions.

We took a look at existing "contrib" modules that could perform the necessary functions. We found that while none would perform the requirements needed. We then looked at a variety of different patterns to determine the best means of getting to a solution that required the least time. When we found a pattern that fit, we built a solution based on that pattern and tested internally. We then had the client test and make bug fixes based on those. We also had the client reach out to a handful of people within their target audience to test the site in order to ensure that it had good usability.

**QUESTION 2** - Briefly describe your process and deliverables involved in building custom Drupal solutions. Focus on how your firm would develop a custom solution that would be reconcile the specific needs of a City agency with a broader set of City enterprise requirements.

We generally follow the Agile methodology. We will work with a client to look at their needs and come up with a wish list of all features or user stories that they would like to see. We will then look at which story(ies)/feature(s) would make the most sense to implement first and work on those. We will work on building that and then deliver to the client to test. Once bugs are worked out, we will look to take live where appropriate.

**QUESTION 3** - Briefly describe your process for developing custom Drupal solutions that are responsive, mobile friendly and able to leverage security best practices.

We have standardized on the Drupal Bootstrap theme as a base theme. This ensures that a variety of best practices including responsiveness and mobile friendly are largely met. Of course, this isn't enough. So we also test on a variety of actual mobile devices as well as using tools like Browserstack to ensure that the site looks good on a majority of browsers and platforms. We generally work with the client to determine which combinations of OSs and browsers we should test to satisfy budget requirements.

We ensure security by using modules that well used. In those cases where a less used module fulfills our requirements, we will do some manual testing to ensure that the module is secure. On custom code, we follow Drupal best practices in writing secure code and use Drupal apis for all functionality.

### **3.C - DESCRIBE CAPABILITIES FOR SERVICE AREA 3**

**INSTRUCTIONS:** Provide below answers to the following questions demonstrating your firm's technical expertise and capabilities relevant to this Service Area.

**IMPORTANT:** Only respondents seeking to become a qualified vendor **in Service Area 3 (Drupal Custom Hosting and Support services)** must fill and meet all the following minimum qualifications.

**QUESTION 1** - Briefly describe 1 project showing how your firm consistently delivers custom Drupal hosting solutions leveraging best practices in a high availability and fully redundant cloud environment.

*[Insert your response here]*

**QUESTION 2** - Describe your processes and ability to deliver support on a 24x7x365 basis for custom Drupal cloud solutions according to a pre-defined service level agreement designed to meet specific requirements of selected highly visible City agencies.

*[Insert your response here]*

**QUESTION 3** - Briefly describe your capabilities to deliver custom disaster recovery, business continuity, and security (including response to denial of service attacks) services designed to meet a variety of operational and regulatory requirements specific to key City agencies.

*[Insert your response here]*