



City and County of San Francisco  
Department of Technology

# Custom Drupal Solutions

## RFQ#DT2016-01

### Attachment V - Responses

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# Section 1: Firm Qualifications

## 1.A - Company Profile Summary

Year Company was founded	2004
Top 3 Areas of Expertise	Drupal Development, Security and Compliance, DevOps and Continuous Integration
Number of Years delivering Drupal solutions	12
Number of Employees	43
Number of Active Projects	120
Company Structure – Public or Private	Private
Revenues generated last fiscal year	Private information, but <\$27.5 mil.
Profitable last fiscal year ( yes / no)	Yes
Active Relevant Company Certifications	Certified Small Business; GSA Schedule

## 1.B - Company Core Expertise

*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.*

### History

**CivicActions** was founded in 2004 by technologists and activists who were inspired by the power of collective action as enabled by technology. In creating CivicActions, the founders envisioned an agile organization comprised of individuals who share a vision of a better world, brought about through the citizens' action and technical connection.

### People

CivicActions has attracted a very talented team of designers, technologists, and managers who are experts in their field as well as active volunteers, board members and advisors to non-profit organizations that are working toward that vision. In addition to the core team who work on a regular basis, CivicActions elicits expertise, when needed, from a much larger community of specialists in media and technology.

### Tools

Adhering to the core values of Balance, Openness and Trust, CivicActions has a policy to deploy Free and Open Source Software when building solutions.

The CivicActions technology evaluation process includes direct contact with key maintainers and contributors to the prospective tools. The development and nurturing of these relationships is key to building a foundation to support a long term reliable infrastructure. Current primary tools include Drupal and CiviCRM, which are hosted on a “LAMP” stack of Linux, Apache, MySQL and PHP. Members of the CivicActions team are contributors to most of these projects, and have relationships with either the project leaders or individuals who are actively involved in their maintenance.

## **Drupal**

Collectively, CivicActions’ team commands over 200 years of active Drupal experience, and has made significant contributions to the Drupal community through module development, work on the Drupal security team, and end-user documentation. CivicActions’ participation in the Drupal.org community includes the maintenance of over 20 projects, with over 500 commits to these projects, and more than 300 patches representing over 40,000 lines of code changed over 1000 issues. CivicActions is collectively responsible for 2000 comments to a total of 200 other projects, including Drupal core and high profile projects such as Views and Panels. Lastly, a member of the Drupal Association since 2009, CivicActions created the very first DrupalCamp.

## **Security and Compliance**

At CivicActions, we have experience applying best practices for security and compliance frameworks for our public sector clients. While requirements change per system and per agency, all are designed in concert to achieve an authority to operate (ATO). We’ve outlined some of the common security and compliance criteria that we experienced on many public sector projects.

### *FedRAMP*

The USDS Digital Services Playbook advocates for digital service teams to consider cloud-based solutions. FedRAMP offers a security assessment framework for evaluating cloud service providers (CSP) and provides its own ATO. FedRAMP-certified vendors have existing offerings for public sector clients to help achieve ATO. At CivicActions, we have experience building on the FedRAMP foundation and managing the shared responsibility of security in the cloud.

### *FISMA*

FISMA compliance is varied, based on the application services, the sensitivity of the data, and the needs of the application users, but at its root, it seeks to ensure that the technologies,

platforms, infrastructure and software of a given product are all acceptable. At CivicActions, our staff is trained in FISMA compliance (and the Risk Management Framework defined in NIST SP 800-37) and will work to develop solutions to meet your needs. We'll work with the Department to develop a system security plan (SSP) and other relevant directives. FISMA compliance emphasizes continuous monitoring, and we leverage open source tools like Red Hat's OpenSCAP scanner and 18F's Compliance Masonry to guide and assist with the ATO process.

### *Section 508 (Accessibility)*

Drupal has a dedicated accessibility team and has developed a high level of built-in WCAG based accessibility as part of the underlying framework, and our team has experience of W3C and 508 accessibility best practices and testing approaches to use during site development. The Accessibility module gives site content authors and maintainers a list of available Accessibility tests, most of which are aligned with Section 508 guidelines. Tests look for single problems like an image missing an "alt" attribute, or whether headers are used appropriately. Each test can be customized to fit your site's specific challenges, and messages users see for each test so that you can provide tips on fixing accessibility problems within the context of your site's editing environment. CivicActions has experience implementing accessibility tools, remediating accessibility issues, and training content providers on how to best use the tools.

### *GovReady*

Over the past year, CivicActions has partnered with Washington, D.C.-based cyber security compliance specialist GovReady to extend our agile approach from software development to operations and system administration. GovReady explores the 18 RMF-defined families of security controls to improve the health your system. What many people don't realize, is that most controls are about how the organization does things, not the information system. GovReady makes all the controls, even the organizational controls easy to understand and to implement. GovReady's product is loosely defined as a single, online service providing a modern, social-software style approach to collaborative system administration and cyber security. This complements the development of technical solutions supported by CivicActions' skilled technical staff, based on open-source technologies.

## **DevOps and Continuous Integration**

At CivicActions, we pair hardened DevOps practices with a sound continuous integration strategy. Each developer will work on their local environments, push code to their local repositories, and await a review from either the Tech Lead or another developer on the project before code is merged into the main codebase. Code reviews will focus on aspects such as code quality, security, performance, accessibility, maintainability and documentation in the form of comments.

We emphasize the use of continuous integration practices to build development operations

automation over manual execution. Our tools are capable of addressing needs for automated testing (Selenium, Behat, Codeception), system and application update management support, application release management, backup / restore procedures, system monitoring, compliance (like Nessus and OpenSCAP), and much more. This includes regular polling to check for system updates, run security scans for vulnerabilities, and scan systems for compliance issues. Other monitoring tools can be used for continuous assurance needs that prevent downtime, check for performance degradation, and proactively check the health of the infrastructure. Noted issues can be integrated into messaging platforms, like Slack, or integrated into the backlog.

## 1.C - Company Delivery Methodologies

*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.*

There are several key factors in our approach that distinguish our work. These are broad themes which inform our entire process, and have become proven pillars of our workflow, largely for the simple reason that they foster sustained, impactful partnerships around our clients' vision and objectives.

### **Agile Practice and Agile Leadership**

Our approach is founded in Agile practice, continuously honed and adapted over years of work and leadership in the Agile world. We have found that Agile is remarkably effective at affording both accountability and flexibility, both efficiency and excellence, and perhaps most importantly, it opens a door to lasting and productive partnership between our team and the clients whom we serve. We have become a leading voice in the promotion of Agile practice, particularly in the governmental sphere, and serve as founding partners of the Agile Government Leadership (AGL) consortium. All of our Project Managers are certified ScrumMasters through the Scrum Alliance.

### **Collaboration**

Our project plan, beginning with Discovery interactions with stakeholders and users, and proceeding through each Sprint's conversations around priority, value, and implementation specifics, is at its core a platform for collaboration between our team, yours, and your users. We will design a platform which remains sufficiently flexible to serve the evolving needs of AcademyHealth, but the fundamental objective of our work together is to forge a dynamic, lasting partnership with your organization. The real benefits of skilled Agile implementation, in other words, are borne out in the ongoing discussion of value, strategy, and goals. We propose our expertise as both consultants to and architects of a lasting digital presence.

## **User research and UX**

We believe that user research and user testing are absolutely critical foundations to identifying specific tasks and requirements organized around the project objectives. Your new website needs to speak to all users, provide them on-going value with targeted content, and encourage a long-term and evolving relationship with the site. Understanding the motivations for users' visits to the site, the content they are looking for, the format that best suits this content and the users' needs – all of these are carefully examined during our user research, or “Discovery” Sprint 1. This emphasis, coupled with the period of testing and analysis prior to launch, allows a holistic and continuous focus on UX that, we have found, builds the most useful and usable products.

## **Integrated “Design Studio” approach**

We pair our designers and developers in close working coordination, and the “Design Studio” approach that is facilitated by this collaboration is central to our project methodology. The Design Studio simply ensures that site architecture and code do not evolve in a vacuum, apart from considerations of how the site will be rendered, presented, and designed. The converse is equally true: wireframes and mockups are not permitted to take shape without close consultation with the developers and themers who will be realizing this work. All of our Visual Designers possess a high level of technical facility, in order to start these important conversations from an initial point of solid mutual understanding.

## **Mobile first**

Unless explicitly instructed otherwise by our client, we design and build all of our products for ease of use in a mobile interface (smartphone, tablet). We generally begin planning our site design and content architecture from a “mobile-first” perspective, allowing the desktop experience to unfold organically from the mobile experience. This order of process ensures a strongly formed mobile presentation, but perhaps more importantly, it also foregrounds important conversations with client about content hierarchy and overall priority of design early in our process, as these matters are that much more salient on a narrow mobile screen.

## **Information Architecture**

We use our comprehensive Discovery work, from interviews with stakeholders and end users, to audits of site content and code, to inform a holistic content strategy for your site. And these inputs, combined with our extensive Drupal experience, allow us to make fundamentally sound and lasting recommendations for content organization. This organization is reflected in the developed content structures, site navigation, and

site features in concert, with an primary emphasis on usability and, as above, mobile-first design.

### **Testing, and Focus on Quality**

While this may sound like an aphorism, we feel that our focus on quality is a major differentiator of our work. We hold a commitment to quality in all aspects of the work that we do, from Discovery work which accurately captures user and stakeholder needs, to well-written and thoughtful requirements which capture the entire story of a task, to stringent testing standards which define “acceptance” (outlined in Section 6), to quality code which is subjected to regular automated testing and held to the highest standards of the industry, and then proudly contributed back to the Drupal community. We know that lasting, impactful work must be well-built at each stage, and we have developed practices which ensure this throughout the project cycle.

### **Training and Empowerment**

We maintain that our work with client teams only has the potential to fully flourish when both partners are invested and involved in the realization of project objectives. We include stakeholders in every stage of our process, fostering your understanding of your own product, and incorporating your feedback, through regular Sprint demos and trainings. We architect Drupal solutions which are intuitive and usable not only to site visitors but to site administrators as well, and we draft instruction for the tools’ usage. Lastly we stand with our clients following launch, offering support as needed, and facilitating conversations about additional enhancements for further phases to the project, as applicable. We insist that mutual empowerment and understanding are essential to the platform’s lasting success.

## **1.D - Key Delivery Personnel**

*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.*

### **Adam Bergstein, Technical Lead, Associate Director of Engineering**

Implements and helps establish best practices in technical consulting and solutions, backlog management, DevOps processes, and quality assurance.

*Expertise:* Drupal Architecture, Continuous Integration and DevOps, Information Security

*Credentials:* Masters of Science in Information Security, Acquia Certified Grand Master, maintainer of many Drupal modules (Key, Encrypt, Password Policy, Taxonomy Menu, Services, and more).

### **Jen Harris, User Experience Lead**

Integrates UX work with agile development by incorporating Lean UX practices and methodologies into project lifecycle.

*Expertise:* User Story Mapping, Product Discovery, Collaborative Design, UI Design, Paper Prototyping, User Research, Quality Assurance

*Credentials:* Certified Scrum Master, 10+ years Visual Design experience, MFA in Visual Art

### **Kevin Walsh, Strategist, Front-end Drupal Developer**

Brings over 18 years of technical experience, as well as a keen sense of digital strategy, to his work helping realize the business goals of his clients.

*Expertise:* Content Strategy, Discovery & User Story Mapping, Front-end theming, Drupal site building, UX, Quality Assurance.

*Credentials:* Certified ScrumMaster, 10+ years experience as a Drupal developer.

## **1.E - Key Project References**

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

Customer Company Name	San Francisco Human Services Agency
Drupal solution delivered	Researched, designed, and built EatFresh.org
Completed on	Initial launch August 2014
Project Duration	Initial development phase 8 months; ongoing support continues.
Key Benefit Delivered	Give low-income families and CalFresh food stamp beneficiaries a valuable resource for low-cost, easy to prepare recipes and nutritional information accessible by desktop or mobile, in multiple languages.
Customer Contact Name	Tiana Wertheim, Senior Admin Analyst at SF Human Services Agency
Customer's Contact phone	415-558-1108
Customer's Contact email	<a href="mailto:Tiana.Wertheim@sfgov.org">Tiana.Wertheim@sfgov.org</a>
Customer Company Location	San Francisco, CA

Customer Company Name	Federal Communications Commission
Drupal solution delivered	Rebuilt FCC.gov, migrated legacy content
Completed on	Initial launch November 2015



Project Duration	Ongoing support; 13 months thus far.
Key Benefit Delivered	A complete mobile-first web redesign in Drupal 7 for the FCC. An entirely new user experience driven on a modern content strategy and refined by user experience feedback and usability testing.
Customer Contact Name	Deanna Stephens
Customer's Contact phone	202-418-0421
Customer's Contact email	deanna.stephens@fcc.gov
Customer Company Location	Washington, DC

Customer Company Name	Defense Security Cooperation Agency
Drupal solution delivered	Researched, designed, and built GlobalNET
Completed on	Initial launch April 2016
Project Duration	18 months to launch; ongoing support continues.
Key Benefit Delivered	A digital platform (meeting NIST and FISMA security standards) for a network of international partner organizations, fostering national and international collaboration. GlobalNet has over 60,000 users and is expected to double its users in the next 18 months.
Customer Contact Name	Paul Will, RIO-PIMS, GlobalNET Program Manager
Customer's Contact phone	703-601-3864
Customer's Contact email	<a href="mailto:paul.will@dsc.mil">paul.will@dsc.mil</a>
Customer Company Location	Washington, DC

## Section 2: Minimum Qualifications

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

Requirement	Yes / No
1) Respondent has minimum of 3 years of experience providing Drupal related	Yes

services.	
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

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

### INSTRUCTIONS

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	No	2.E
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## 2.C - MINIMUM QUALIFICATIONS FOR SERVICE AREA 1

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

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

## SECTION 3 – SERVICE AREA CAPABILITIES

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

*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.*

CivicActions has made user-centered design a priority for all of our projects. We recently completed a redesign and Drupal upgrade for GlobalNET, a communication platform for a network of nearly twenty organizations working to foster national and international education and collaboration. To ensure that user needs were met, we leveraged user-centered design and UX techniques including direct stakeholder interviews, story mapping, personas, collaborative/ cross-functional design studios, and hands-on user testing of work in progress. Incorporating direct user feedback, we iterated several times on our initial design solutions in

advance of launching the live product, and we are continuing to gather user feedback and metrics to inform future design and functionality decisions.

*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.*

We rely heavily upon Zen base theme, creating child themes that are fully responsive, meaning desktop, tablet and mobile views are taken into consideration. Further, we use several front-end technologies to increase our productivity, such as SCSS, Compass, Grunt, and HTML5 compliant templating. Drupal, and specifically Drupal's menu system, is inherently structured to deliver content in a well organized, hierarchical manner, thus allowing for Government or NGO friendly content presentation, and a positive user experience. Main menus, sidebar links, and footer items all play nicely together, allowing for an intuitive, easily navigable site.

We have also deployed solutions based on the US Web Design Standards (<https://standards.usa.gov/>), which provide an established style guide, responsive features, and accessibility standards. This is an excellent starting point for many cities and government projects, as it creates a consistent look/feel and functionality – one that is being adopted by many agencies – and it utilizes tools like SASS/Bourbon/Neat for styling that aligns well with Drupal's theming layer.

*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).*

As stated above, we ensure our theme work uses HTML5 elements, ensuring that screen readers are able to capture and deliver appropriate content to users. Further, all pages are tested in multiple screen reader tools, and in multiple browsers, prior to content delivery. We also run our builds through site check tools such as <http://www.508checker.com/>, and address all items of concern.

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

*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.*

CivicActions strives for code quality, clarity, reusability, and automated testing during development. Our company has established Agile software development best practices and

employs QA/code reviews prior to any releases/integrations. Our development process includes clarity in source control commits, a focus on open sourcing, automated testing tools such as Behat and Codeception, and continuous deployment practices when applicable. We strive to utilize tested community-contributed Drupal modules in a project before creating custom solutions, yet we understand when customizations are necessary.

In a site redesign project for the Executive Office of the President (under NDA), we faced the challenges of deploying a new site with federal requirements of no data loss or downtime while also preserving a public data API. User stories, theming changes, and data migration tickets were prioritized in an Agile backlog. Concurrent development occurred simultaneously with 8 engineers working on 30+ custom modules with a dataset of over 20+ million rows. Integration of new code faced three levels of review - stakeholder, peer developer, and a release master, all with detailed testing plans and QA criteria. Drupal coding standards were enforced using PHP Codesniffer and automated testing was performed using Behat and JMeter. A full deployment plan was created and run multiple times on development servers prior to public release, concluding with a successful launch within a 4 hour window.

*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 reconcile the specific needs of a City agency with a broader set of City enterprise requirements.*

In the discovery process, we identify stakeholders, user stories, and scenarios for features. There may be multiple stakeholders in a city organization due to many internal departments. For example, we have worked with a city agency that had an immediate user need for a local events calendar, while the other city departments were looking for similar calendar solutions. By identifying the other departments' needs early in the process, we were able to architect the calendar module to accommodate the organization, and maintain one reusable custom module that was deployable in multiple Drupal installations. We try to use existing community contributed modules, as they have pre-existing support mechanisms, however, we are comfortable building custom module solutions when necessary.

To cite another example, in the course of development for the City of Los Angeles' web portal, the client requested a multi-site header navigation solution that would share common links across all city sites, many of which utilize different CMS platforms. We designed a custom javascript library in conjunction with a custom Drupal module, allowing admin users to maintain a global navigation system. This solution can be viewed on any of the City of Los Angeles' municipal websites such as: <https://www.lacity.org>.

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

As noted above, we utilize base themes when possible that already have established responsive and mobile-friendly designs, such as Zen or US Web Design Standards. Many prior city projects have had a “mobile-first” design due to the overwhelming use of mobile devices for accessing government services and data. To test compatibility, we utilize tools such as CrossBrowserTesting.com to generate screenshots for mobile/desktop platforms on agreed supported devices. Some of security practices include: ensuring that data flows through Drupal sanitized functions, that access permissions are correctly assigned, that contrib module versions are updated, and that 2FA integrations are utilized. We have CivicActions staff on the Drupal Security Team, and we are actively highly engaged in the Drupal community. Additionally, CivicActions is presently engaged in building open source tools for FISMA compliance through our partnership with GovReady.