Pre-qualified Drupal Consultant List Guidelines

Introduction

The Department of Technology ("DT) has developed these guidelines to assist City departments in accessing consultants from the DT's pre-qualified Drupal consultant lists. The Drupal Consultant lists were established to help City departments access a quality pool of vendors with Drupal expertise who can respond with speed and flexibility to department's increasing demand for website services.

- **To use the DT's pre-qualified Drupal consultant lists you must obtain prior written approval from the Department of Technology before 1) a Request For Quote is issued and then 2) before a contract is awarded** by contacting the Digital Web Services group via email webmaster@sfgov.org or phone (415) 581-3972. Appropriate use of the DT's lists saves departments the time and effort of conducting their own formal competitive solicitation process by allowing access to pre- qualified consultant lists.

- Responsibility for appropriate use of pre-qualified lists belongs to each City department choosing to use the DT's lists for subsequent selection processes and contracts. Appropriate use of pre-qualified lists includes solicitation, selection, and contracting for scopes of services solicited in the Request-For-Qualifications ("RFQ") establishing the pre-qualified list. It is not appropriate to use a pre-qualified consultant list for services that were not included or envisioned in the original RFQ as described therein.

- Once written approval is obtained from the Department of Technology's Digital Web Services group, if a City department has any additional questions or concerns regarding appropriate use of the DT pre-qualified Drupal consultant lists, it is the responsibility of the City department to seek legal counsel and approval from the City Attorney's Office before using the lists.

We hope you find this document useful and welcome your questions and suggestions for improvement. Please contact dtcontracts@sfgov.org with your feedback.

STEP ONE: NEED INITIATION AND MATCHING PROCESS

In order to effectively leverage the services provided by these vendors, review the Drupal RFQ solicitation to ensure that the scope of services you need fits within the scope of what DT solicited. DT will be glad to assist through this process in 2 key ways:

- **DT will review and approve your scope of work prior to the issuance of your Request For Quote** to ensure that your Department's requirements are compatible with the City's Drupal solution if you wish to leverage the City's shared codebase and environment. DT is also glad to assist answering scope related questions as needed. Your scope of services should include the sections listed below depending on which service area you are targeting.

- **DT will review and approve the final contract scope of work prior to award** to ensure that your selected vendor's bid response is compatible with the City's Drupal solution. This will protect your Department from the vendors making inaccurate claims of compatibility with the City's Drupal solution and environment.

Project Objectives	Define what you are trying to accomplish
Design Requirements	Specify your design objectives; the Drupal theme and design templates you are looking for; outline any standards - ex. any required branding and mobile/responsive expectations
Content and Taxonomy Requirements	Define how you wish to organize your content at a high level; specifically the different content types that you want to use organize your content
Custom Features and Development Requirements	Define which custom features you want the vendor to build (ex. modules to implement; specific items such as a custom calendar, or predefined search categories; etc.)
Custom Site Support	Departments building custom websites will need a set of number of support hours per year to fix any issues with the custom code your selected vendor developed. DT will be glad to assist if you need help publishing or fix front-end HTML/CSS issues with any published content.
Custom Hosting and Support Services	Although DT offers Drupal hosting services for custom websites that use the standard codebase, some Departments may need customized hosting so that you can have control your own codebase, admin access to your environment, file system (how files are structured) and the level of security you wish to implement (for example our standard sites limit scripting for security purposes).

STEP TWO: CIVIL SERVICE COMMISSION APPROVAL

As part and parcel of the RFQ for the creation of the Drupal lists, DT sought and secured a categorical Civil Service Commission (CSC) approval to contract out any Drupal services within the scope of this Drupal RFQ subject to the following overarching conditions:

PSC#: 42585-15/16
PSC Duration: 5 years 1 week
PSC Start Date: 6/20/2016
PSC End Date: 6/30/2021
PSC Cumulative Amount in the course of the 5 years: $7,500,000

DT secured this categorical PSC approval from the Civil Service Commission in order to help citywide departments streamline their follow-on procurement process in accessing the DT Drupal pool.

The Civil Services Commission's Policy and Procedures on Personal Services Contracts can be found online via the following web address:
http://sfgov.org/civilservice/sites/default/files/PSC%20Policy%20with%20Attachment%2011-2014.pdf

STEP THREE: COMPETITIVE CONTRACTOR SELECTION -THE REQUEST FOR QUOTE PROCESS

A. Do You Have to Conduct Further Competition for Contractor Selection?

Yes, you must. Given that the Drupal RFQ list is valid for longer than 2 years, a follow-on competitive process, however streamlined, is required by Administrative Code 21.4c.

B. How to Access the Vendors in the Drupal Lists?

Departments will Issue Requests for Quotes by Service Area. All vendors in a particular Service Area must be given the equal opportunity to bid on a specific SOW.

- The Request For Quote process is intended to be a streamlined process for soliciting more information from a short-list of pre-qualified consultants. Asking for quotes based on either lowest bid or best value will promote competition based on price and service approach. In either case, fairness and consistency of communications are important.

- You may use e-mail to send out a Request For Quote. We recommend using a blind cc to the firms so that competitors are not made known to one another.

- Clearly specify the evaluation criteria: lowest bid or best value. Composition of the panel is at the discretion of the department. Identify one department contact designated to answer questions and to provide any and all information regarding the Request for Quote.. Provide clear submission requirements and deadline for response.

C. Local Business Enterprise Rating Discounts/Scoring Bonuses for the LBE Prime Vendors

In the follow-on competitive process to access vendors in the RFQ, if your estimated contract budget is more than $10k, please apply the following LBE Rating discounts/scoring bonuses in your scoring process.

Pursuant to Chapter 14B, the following rating discount/scoring bonus will be in effect for the award of a project for any Proposers who are certified by CMD as a LBE, or joint ventures where the joint venture partners are in the same discipline and have the specific levels of participation as identified below. Certification applications may be obtained by calling CMD at (415) 581-2310 or http://www.sfgsa.org/index.aspx?page=6058. The rating discount/scoring bonus applies at each phase of the selection process. The application of the rating discount/scoring bonus is as follows:

(1) A 10% discount/bonus to an LBE; or a joint venture between or among LBEs; or

(2) A 5% discount/bonus to a joint venture with LBE participation that equals or exceeds 35%, but is under 40%; or

(3) A 7.5% discount/bonus to a joint venture with LBE participation that equals or exceeds 40%; or

(4) A 10% discount/bonus to a certified non-profit entity.

During the DT Drupal RFQ phase, the following firms have been identified as entitled to a 10% rating bonus:

Firm	Status	Bonus
Chapter Three	SF-Micro-LBE-OBE	10%
Exygy	SF-Micro-LBE-OBE	10%
Champsee Solution	SF-Micro-LBE-OBE	10%

D. CMD Review of Subcontracting Requirement

With respect to the Drupal RFQ, DT sought and secured a 14B Subcontracting goal waiver from the Contract Monitoring Division for City departments to access the DT-administered Drupal pools in the course of the next 5 years subject to the following conditions:

- 14B Subcontracting Goal Waiver: all contracts resulting from use of the DT-Drupal pools.
- Contract Start Date: 7/1/2016
- Contract End Date" 6/30/2021
- Cumulative Dollar Amount of the CMD 14B Subcontracting Waiver in the course of 5 years: $7,500,000

STEP FOUR: CONTRACT MONITORING DIVISION ("CMD") REQUIREMENTS

A. Apply LBE Rating Discount/Scoring Bonus for Contracts > $10k

LBE rating discounts/scoring bonuses must be applied for contracts of $10,000 or more in the follow-on streamlined competitive process for contractor selection.

B. Does the Original RFQ Require CMD review for Local Business Enterprise ("LBE") Subcontracting Prior to Contractor Selection?

The LBE subcontracting requirement for contracts resulting from the use of the DT Drupal pools has been waived. In this instance, you may skip this step. Please consult with your department's CMD Compliance Representative with additional questions.
http://www.sfgsa.org/index.aspx?page=6138

STEP FIVE: FINALIZING CONTRACTOR SELECTION AND CONTRACT DOCUMENTS

Once your Department has finalized the follow-on competitive process and selected a contractor for negotiations, you should follow the City's standard contracting process.

- *Compliance* – Ensure that the selected firm is fully compliant with the City's requirements (look up their status on screen 9560 in FAMIS Purchasing (ADPICS). Several firms have started, but not completed compliance processes as indicated with asterisks on the pre-qualified consultant list. We cannot do business with any firm that is not fully compliant. Firms are responsible for completing compliance processes with the City's respective agencies (CMD for 12B; TTX for taxes, etc).

- *City's Terms & Conditions* – Tailor the City's terms and conditions boilerplate (P-600 http://mission.sfgov.org/doccenter/Search.aspx?S=0&K=P-600). Complete Appendices A and B (Scope of Services and Calculation of Charges, respectively) which are part of the City's terms & conditions boilerplate and submit draft to contractor for approval.

- *Insurance Coverage* - Work with the selected firm to obtain proof of insurance coverage per Section 15 of the City's terms & conditions boilerplate. The City's Risk Management office will need to approve any changes.

- *City Attorney Preliminary Review* – Once you have received and incorporated the firm's comments, e-mail the documents to the City Attorney's Office Contracts Unit (or your City Attorney if department-specific) for review and approval.

- *Finalization for Signatures* – After receiving approval from the City Attorney's office, the contract documents can be sent to the contractor for signatures. Your accountant should establish a purchase order and submit the paperwork to OCA.

- *Contract Management and Payment Approval* – Your department's project manager will be responsible for managing the project, pay invoices and track delivery.