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: 2010
2. Top 3 Areas of Expertise	Expertise: Drupal, Design, Support
3. Number of Years delivering Drupal solutions	Years (#): 6
4. Number of Employees	Employees (#): 30
5. Number of Active Projects	Projects (#): 60
6. Company Structure – Public or Private	Structure: Private
7. Revenues generated last fiscal year	Revenues ($):$1,800,000.00
8. Profitable last fiscal year (yes / no)	Profitable (yes/no): yes
9. Active Relevant Company Certifications	Certifications: Drupal Association Organizational Member

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.*

Kanopi Studios

Kanopi Studios is a Boutique Drupal Design & Development Agency. We specialize in intelligent solutions.

We provide our clients with a value based, data driven approach to their website related needs. We are currently 30 employees strong. All Kanopi employees have a minimum of seven years experience in their chosen technology and each over ten years each on the web.

Our team members have designed and built hundreds of Drupal Web Projects. From single-paged static websites offering brochure-style presentation, to highly complex websites that are feature-rich and socially interactive. Our websites are user-focused and built for easy access to information, ensuring high conversion rates.

While many of our team members are in San Francisco or throughout California, we're a fully distributed company. This means when we look for the best designer, developer, project manager, we're not limited to our small neck of the woods. We're located on the internet, and so is our fantastic team.

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.*

Process, Practices & Methodogies

A design & development project is a series of decisions as much as it is a set of deliverables. Through the outlined phases below, we'll hone in on a goal-driven narrative to support a design system made up of strategic elements to assist City departments and agencies in enhancing their online presence.

Discovery: The heart of our process is research. We'll interview stakeholders and take an in depth analysis of project goals, user needs and technical requirements of the new site. This involves an evaluation of existing resources / requirements to create a roadmap for development of new features and functionality. Every decision we make on the project will be based on what we learn in this phase.

Content Strategy & Information Architecture (IA): Planning for the creation of useful, usable content that helps site visitors become interested and engaged while addressing common barriers and concerns. Intelligent IA makes content easier to manage, and creates a better overall experience for users. This is where we create the wireframes and finalize the technical strategy.

Design: Designing website pages that reflect organizational priorities and facilitate user actions on the site while conveying the organization's identity/personality. Here we also establish a complete design system that integrates structure, content, interaction, and visual expression.

Custom Theme Design and Front End Developement: We then prototype and code the unique layouts, interactions, and associated elements to create the front-end behaviors and mobile & responsive layouts.

Drupal Custom Development: Utilize information architecture and user experience intelligence to build solutions-based sites using core and custom modules to meet client's technical and functionality requirements. We document the decisions we've made. We plan a development process which allows us to test early and often.

Quality Assurance: Early on in the Drupal development pipeline, we will define the acceptance criteria in tandem with our feature development work. At the completion of each development milestone, all work will go through a quality control process that includes a development code review by Kanopi's Technical Lead and Project Manager.

Support: Our dedicated support team specializes in providing on-going website maintenance to prevent security and functionality issues, as well as to enhance the functionality of the client's site as their needs change or expand.

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.*

Key Delivery Personnel

Each project will be professionally staffed with the following team:

- User Experience Specialist: Vanessa Turke
- Graphic Designer: Andrej Klimo
- Technical Lead: Jason Savino
- Drupal Themer: Paul Sheldrake
- Drupal Custom Backend Developer: Shiraz Dindar
- Account Manager: Anne Stefanyk
- Project Manager: Deb Pappalau

Please feel free to checkout these profiles on our website at www.kanopistudios.com/team

The Top Three Key Service Delivery Personnel are listed here:

User Experience Specialist: Vanessa Turke

Vanessa Turke has been managing projects for the education, non-profit, and enterprise sectors since 2003. Since 2006, she had focused on content strategy, usability and information architecture, and has finely honed the ability to translate business requirements and website usability research into detailed UX and functional specifications. She has a deep understanding of content management and the user-centered design process. She enjoys collaborating with stakeholder groups and multi-disciplinary teams to solve complex user journeys and design challenges. If it's a puzzle, she wants to help solve it!

Creative Designer: Andrej Klimo

Digital designer with a passion for crafting delightful user experiences. Andrej helps clients translate their goals into a captivating visual reality. He's created websites and shaped identities for a diverse range of clientele. Grounded in the past, inspired by the future, Andrej is always trying to reach around the digital curve.

Technical Lead: Jason Savino

Jason's skillset is equal parts technology and consulting. Over the past ten years, he has helped his clients in diverse areas: from fixing performance and high-availability problems, to reducing Customer Acquisition Cost, increasing conversions, and refining strategic business goals. He's been working with Drupal since 2008 on many different sites and has managed projects and teams for Olympus, Waste Management, Guess, Stanford, and Action Against Hunger, among others.

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
Customer Company Name	Center for Digital Archeology
Drupal solution delivered	Discovery, Strategy, Graphic Design, Custom Theme Development, Custom Drupal Development
Completed on	May 2015, providing ongoing support and micro development
Project Duration	6 months
Key Benefit Delivered	Custom Design, Strategy, Expert Level Drupal Development: https://www.kanopistudios.com/work/mukurtu
Customer Contact Name	Michael Ashley
Customer's Contact phone	+1 415.488.6768
Customer's Contact email	michael@codifi.org
Customer Company Location	Larkspurk, CA

REFERENCE # 2	REQUIRED RESPONSE
Customer Company Name	Lightbulbs Etc
Drupal solution delivered	Discovery, Strategy, Graphic Design, Custom Theme Development, Custom Drupal Development, Commerce
Completed on	Ongoing Development, working on third site
Project Duration	Client of Kanopi's for 2.5 years, projects are about 4 months in length each
Key Benefit Delivered	Custom Design, Strategy, Expert Level Drupal Development: https://www.kanopistudios.com/work/landscape-light-experts
Customer Contact Name	Ryan Sher
Customer's Contact phone	(888) 545-4837
Customer's Contact email	ryan@lightbulbsetc.com
Customer Company Location	Orange County, CA

REFERENCE # 3	REQUIRED RESPONSE
Customer Company Name	Mises
Drupal solution delivered	Discovery, Strategy, Graphic Design, Custom Theme Development, Custom Drupal Development,
Completed on	October 2014
Project Duration	6 months

Key Benefit Delivered	Custom Design, Strategy, Expert Level Drupal Development: https://www.kanopistudios.com/work/mises-institute
Customer Contact Name	Chad Parish, Technology Manager
Customer's Contact phone	334.321.2154
Customer's Contact email	chad@mises.org
Customer Company Location	Auburn, AL

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

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 <u>all</u> 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

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.

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.*

Project: Leveraging Best UI/UX Practices

The Mises Institute: http://mises.org

The Mises Institute is the world's largest, oldest, and most influential nonprofit educational institution devoted to promoting the Austrian School of economics, freedom, and peace in the tradition of classical liberalism. Kanopi worked with the Mises Institute to re-launch their digital presence. Leveraging many of the UI/UX practices listed in our available services in Strategy, our team designed and built a modern, user driven architecture, then migrated 450,000 pieces of unique content, with a meticulous eye on SEO.
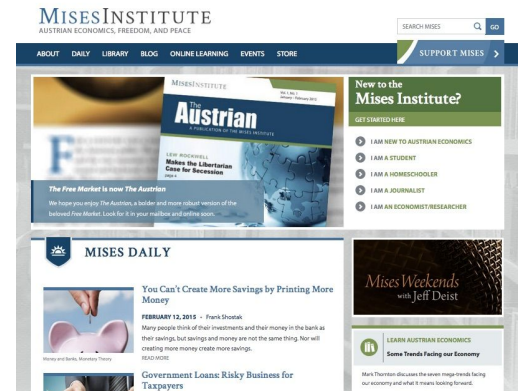
We implemented a custom Apache Solr search to drive content consumption, as well as a donations microsite, integrated with SalesForce. The site has been successfully launched and we provide ongoing support. We are working on a Phase 2 roll out for the online Academy and Store.

Specific UX Project Goals from the Mises Project:
1. Define the primary audience segments the website needs to serve.
2. Assess how to clearly present a value proposition for the organization's offerings that inspires when emotional persuasion is required, and informs when data is needed.
3. Identify the optimal information structure, navigation style and user journey for each of the primary audience segments.
4. Optimize the presentation of the content for each audience segment.

5. Plan out the display logic of page elements and wireframe key screens for re-design and development planning.
6. Respond to mobile, tablet and desktop users with a responsive plan.

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.

Process and Deliverables in Building Custom Drupal Themes

Discovery

We take this time to deeply understand your communication goals and your audiences. From this, we will derive clear design priorities and a path to success. We will also explore technical requirements and constraints to make sure that we have uncovered all details and expectations. The resulting shared understanding of the goals and process allows us to move forward quickly and smoothly in our work together.

Our kickoff activities include an initial group meeting, discussion of project goals and expectations, individual stakeholder interviews, audiences and use cases prioritization, content and workflow discussions, design exploration exercises, and a project management/process review.

The key goal of Discovery is a strong shared understanding of the project priorities and parameters. We will build in enough time for reflection and feedback, while accommodating your team's primary responsibilities, and maintaining project momentum.

By the conclusion of Discovery, everyone on the City and Kanopi teams should be in agreement on:
- Overall project strategy
- Design principles and desired experience attributes
- The scope of content, features, and functionality
- Technical standards and requirements
- The roles of everyone involved in the project for the duration of our work, and the process for getting there

We will summarize our findings and recommendations in a follow-up presentation and a written brief, which your team will have a chance to review and amend before we move forward.

Once we agree upon the priorities, strategy, and approach, the brief will serve as a guide for all future decision-making.

Activities

Kickoff meeting: Review goals and process, and invite input from the larger team. Define success criteria for the user experience. Discuss the various audiences, existing and desired, that you would like to reach online through the website.

Project stakeholder interviews: Have individual conversations with key members of the Agency, representative members of desired audiences and key members of the community at large.

Representative end-user interviews: Speak with 8–10 representative end users and community members.

Comparative design research: Review current industry-wide best practices and the approaches used by similar or exemplary organizations in their online communications.

Ideation work sessions: Based on your goals, available content, and the opportunities our research uncovers, we will work with you to identify the most effective storytelling approaches.

Feature Prioritization: We will work with you to assign priority to the content, features, and functionality based on user and organizational needs and the associated level of effort.

Analysis and recommendations: Once we have completed gathering information, we will analyze what we have found and follow up with any clarifying questions.

Detailed project planning: As we wrap up the Discovery period, we will reallocate the remaining time and budget, and create a detailed project plan and schedule.

Deliverables

Discovery Brief reflecting our findings and summarizing the overall strategy and design approach, content and functional requirements, technical specs and compatibility, and

recommended high-level design and content approach. Detailed project plan and schedule for the remaining work.

Information Architecture and Content Strategy

Based on the requirements we defined in the first part of the project, we will document the required content types and unique elements, iteratively reviewing with your team to ensure that our design accounts for all anticipated features and functionality. This documentation will be lightweight, but sufficient to move into interface design.

It is during this phase of work that we will also pay particular attention to entry points and engagement paths to ensure that your site functions effectively as the centerpiece of your overall online communication strategy.

Activities

Conceptual model: Conceptualize, prioritize, and relate all site elements based on audience interests. This model will follow the ideation and prioritization in Discovery and will form the basis for all eventual design decisions.

Information architecture: Document the detailed structure of the website, including navigation, layouts, and modular page elements. This will form the basis of the visual design system.

Content planning: Continued from Discovery, define and specify required content.

Voice and messaging hierarchy: Based on the work in Discovery, collaboratively define the voice and tone of the website. Identify and prioritize key messages and map them to overall site structure.

Graphic Design

Once we have achieved understanding of and agreement on the goals and requirements, we will design the foundation of the visual system. This will include palette, typography, overall look-and-feel, and core interactions.

Activities

- Conduct a visual design and branding work session to create a shared visual vocabulary and define desirable brand attributes.
- Provide up to two visual concepts for discussion.

- Iterate and revise based on feedback, up to 2 rounds of review and revision.
- Once you approve the design of this initial web presence, we conduct cross-platform and device QA.

Deliverables
- Final design direction for the website including overall look-and-feel, palette, and typography.

Custom Theme Design and Front End Developement

We will proceed iteratively from high-level sketches to detailed interface design, beginning in Photoshop and moving to HTML to build the front-end behaviors and responsive layouts. While we are detailing out the complete design system as a set of front-end page templates and individual interactive elements, we will work with your team to ensure we have an appropriate set of demonstration content to validate the effectiveness of the system.

We will develop standards-compliant HTML, CSS, and Javascript, for all templates and interface elements. We will conduct progressive technical QA and accessibility testing on the front-end code as we develop the site to ensure it meets your standards.

Activities
- Apply approved visual direction to all unique content types and interactive elements as defined in Information Architecture.
- Develop HTML/CSS prototypes
- Conduct iterative reviews and revise based on feedback
- Identify and finalize interface language, labeling, and imagery
- Provide sample code for technical review and sign-off
- Create HTML/CSS for agreed-upon templates and modules of the design system
- Create necessary JavaScript to illustrate any designed behavior or interactions
- QA front-end code against agreed-upon standards

Deliverables
- All required front-end code ready for CMS Implementation. Detailed implementation and launch plan.

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).*

Fortunately accessibility overlaps with other best practices we always adhere to. The work we do in mobile web design, device independence, multi-modal interaction, usability and search engine optimization (SEO) satisifies compliance with Americans with Disabilities Act.

In addition, we work with many higher education and enterprise organizations like Autodesk and Del Monte, all which require mobile and accessibility 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.* |

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.*

Project: Leveraging Software Development & Testing Methodologies

Center for Digital Archeology: http://mukurtu.org

Mukurtu (MOOK-oo-too) is a Drupal distribution aiming to empower communities to manage, share and exchange their digital heritage in culturally relevant and ethically-minded ways. Kanopi worked with CoDA to architect, UX, design and develop Mukurtu 2.0. We followed an agile development methodoloy, developing User Stories that would then act as the User Acceptance Testing criteria. At the completion of each development milestone, all work went through a quality control process that included both a development code review by Kanopi's Technical Lead and Project Manager.
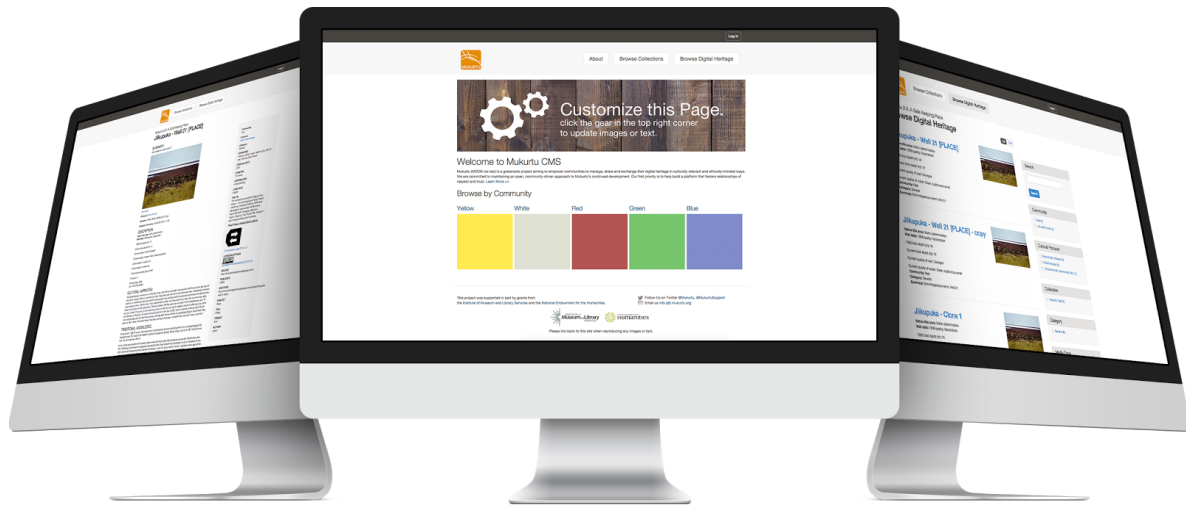
Mukurtu 2.0 was a process of upgrading the code base and working on UX design as we upgraded. Keeping a focus on the user, we created a better user workflow with the addition of a dashboard and a wizard on site spin up. In addition, we replaced the media module with Scald, cleaned up permissions and used bootstrap as the base theme for ease of extension.

Testing Process at Kanopi Studios

At the completion of each development task all work will go through a quality control process that includes a development (code) review by the Technical Lead before any changes are made live. A review by the client manager(s) will also be requested for a final go-ahead. Once the changes are made live a final review will be completed to make sure all changes have been effective and are working properly.

A story will be marked "Started" by the developer beginning the work. When the feature is complete, the developer will mark the status as "Finished or Ready for Review". When a peer review is completed, story is marked as "Delivered" if complete or reassigned for further development.

The "Delivered" stories are ready for review by the project's Project Manager. These are checked by walking through any acceptance criteria defined for the completed item.

The story will be marked as "Accepted" if the acceptance criteria is met. If not, the story may be "Rejected" and sent back to the development team to re-start.

Only after this process is performed will any work be allowed to be scheduled for sprint review demos and/or feature reviews.

Our overall project methodology focuses on key stages of project development. This allows for greater attention to the components and results in a more streamlined process. The following process has been developed and designed to promote client engagement and collaboration along the way with sign-offs on key points of production.

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.*

Process and Deliverables in Building Custom Drupal Solutions

Drupal Custom Development

We will begin planning for a successful launch, and beyond, from our first meeting together. We will build the site in either Drupal using best practices. During the Information Architecture and Interface Design phases of work we will identify and explicitly agree in advance which aspects of the content and functionality will be editable through the CMS.

Activities

- *CMS development:* Integrate design system templates and modules with CMS. We will be conducting iterative reviews throughout.
- *Launch planning:* Review and finalize detailed process and schedule for implementation, launch, and delivery.
- *Test planning:* Define a QA plan and process for verifying front-end design, website content, and back-end system functionality and performance, including members of your team as appropriate.
- *Content entry:* Migrating content.
- *SEO (search engine optimization):* Ensuring all appropriate modules are enabled and configured.
- *Training:* Provide professional, easy to understand training videos/documents.
- *QA:* Verify that the website meets the agreed-upon criteria for soft launch, for design, content, and functionality.
- *Delivery:* Provide any additional assets, instructions, or materials necessary to the continued successful operation of and interaction with the website.

Deliverables

- Feature-complete website. All assets necessary to use and extend design system.

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

Drupal is considered one of the most robust open source platforms when it comes to keeping information secure and has a variety of built-in features that are designed to protect sensitive data. Security is so important to us that we we have our very own Security Specialist. We stay informed about up and coming vulnerabilities in order to mitigate them.