



Edwin M. Lee, Mayor

Department of Human Services  
Department of Aging and Adult Services

Trent Rhorer, Executive Director

**MEMORANDUM**

**TO:** HUMAN SERVICES COMMISSION

**THROUGH:** TRENT RHORER, EXECUTIVE DIRECTOR

**FROM:** SUSIE SMITH, DEPUTY DIRECTOR  
JOHN TSUTAKAWA, DIRECTOR OF CONTRACTS

**DATE:** APRIL 26, 2017

**SUBJECT:** **CONTRACT RENEWAL:** EXYGY, INC. (FOR-PROFIT) TO CONTINUE REBUILDING THE SFHSA.ORG WEBSITE

<b>CONTRACT TERM:</b>	<u>Current</u> 7/1/16- 6/30/17	<u>Renewal</u> 7/1/17- 6/30/18	<u>Contingency</u>	<u>Total</u>	
<b>CONTRACT AMOUNT:</b>	\$743,153	\$330,475	\$33,048	\$363,523	
<b>ANNUAL AMOUNT:</b>	7/1/17- 8/31/17 \$80,475	9/1/17- 6/30/18 \$250,000			
<b>Funding Source</b>	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
<b>FUNDING:</b>	\$247,856	\$39,657	\$42,962	\$33,048	\$363,523
<b>PERCENTAGE:</b>	75%	12%	13%		100%

The Department of Human Services (DHS) requests authorization to renew the contract with Exygy, Inc. for the period of July 1, 2017 through June 30, 2018, in an amount of \$330,475, plus a 10% contingency for a total amount not to exceed \$363,523. The purpose of the contract is to continue rebuilding the public-facing, SFHSA.org website, focusing on content and design.

**Background**

The Human Services Agency’s website was last revamped in 2010. In 2015 the agency commissioned a vendor to produce the Digital Strategy Report which found that the existing



HSA website was outdated and not user friendly. The renewal of this contract will continue work started in 2016 by the same contractor to design a highly accessible and usable website that will better meet the needs of a diverse group of client, community, and internal users.

**Services to be Provided**

Services to be Provided by the Contractor are in two phases. In the first phase, the vendor will help write new content for the website and will support HSA in continuing to rebuild the website. New content will be drafted for publication and arranged in a way that is easy for users to digest. The visual design of the content will be enhanced by uploading images and optimizing page layout. HSA content style guide and training materials will be finalized. The contractor will perform any of the content governance roles, including writer, editor, content manager or chief editor, as required by the HSA Communications Director.

In partnership with HSA’s learning and development team, the vendor will train staff from each of HSA’s programs (e.g., CalWORKs, Medi-Cal, Foster Care, In-Home Support Services, Human Resources, etc.) to sustain the freshness and friendliness of the new website content.

The vendor will also assist staff from HSA’s Digital Services Team and Innovation Office as they continue to enhance the website design. This will allow HSA to be responsive to requests from its user community as clients, staff and community members begin to use the site.

In the second phase of this renewal, the contractor will be used at the discretion of the agency in providing content and design support as supervised and prioritized by HSA’s Director of Communications. In conjunction with HSA staff, the contractor or subcontractor will perform “deep dives” into program content and make recommendations as to the organization, display and text of each program’s web content going forward. The vendor will also conduct and summarize findings from User Experience testing as part of the “deep dives” into program content. Activities from Phase I may also continue as needed.

**Selection**

Contractor was selected through Request for Proposals (RPF) #676, which was competitively bid in March, 2016.

**Funding**

Funding for this contract is provided by the City and County General Fund, State and Federal funds.

**ATTACHMENTS**

Appendix A – Scope of Services

Appendix B – Calculation of Charges

## Appendix A - Scope of Services

### Exygy, Inc. Rebuilding SFHSA.org Website

July 1, 2017 – June 30, 2018

#### I. Contract Purpose

The purpose of the contract is to continue to rebuild the SFHSA.org website (“new website”), focusing on content and on analytic and IT support.

#### II. Target Population:

“Any user” which includes a broad target population, such as low-income individuals, non-native English speakers, people with physical and cognitive impairments, other government agencies, HSA staff, and community partners, among others.

#### III. Description of Services / Deliverables

##### A. Phase I – Content Authoring and Content, IT and Analytic Support Tasks

###### Content Authoring and Support

Contractor shall provide content support as supervised and prioritized by HSA’s Director of Communications during the term of this contract. Contractor will subcontract with a mutually agreed, HSA-approved subcontractor. If a mutually agreed subcontractor cannot be found, HSA may then decide not to continue with the content support portion of this contract.

Contractor’s tasks may include (but are not limited to, nor inclusive of) the following:

1. Review existing “legacy” content that has been moved to the rebuilt sfhsa.org (“new site”) from the prior version of the site. Edit this text for style, accuracy and visual presentation.
2. Work with HSA program staff to draft new content for the rebuilt sfhsa.org. Enter this text into the Drupal content management system for publication on the new site.
3. Arrange content on the new site, grouping text in a way that is easy for users to digest and in line with the content strategy for the new site.
4. Enhance the visual design of content added to the new site. This includes selecting, uploading and positioning images for the site and otherwise optimizing the display.
5. Provide support to the content governance model in Drupal’s content management system. If requested by the HSA Communications Director, this will include performing any of the roles of the governance system: writer, editor, content manager or chief editor.
6. Perform any remaining work deemed necessary by the HSA Communications Director to convert the Alpha content deliverables (see below) from draft to final versions.
7. Provide support for any ongoing CMS (Content Management System) training as well as ad-hoc support for new users of the system.

8. Work with HSA's IT (Information Technology) team to define requirements for any ongoing development related to the content management system or to the way that content will display on the new website.

Alpha Content Deliverables (for reference, see above):

1. Provide visual guideline for the site colors, fonts and styles of the website.
2. Define information architecture (e.g. site map) of new website, including names and contents of Service Areas and organization of pages that are rebuilt or re-architected.
3. Finalize Guideline that establishes the tone and voice to keep all content consistent.
4. Finalize Governance model that outlines the roles, responsibilities, and processes to maintain the site content post launch.
5. Provide draft of Guidelines for terminology, structure, and other elements to keep all content consistent.

#### IT Support

Contractor shall further provide IT support as supervised and prioritized by the Head of HSA's Digital Strategies Team during the term of this contract. Contractor may perform IT support tasks directly or may subcontract with a mutually agreed, HSA-approved subcontractor for select IT support tasks as mutually agreed by contractor and HSA. Tasks may include (but are not limited to, nor inclusive of) the following:

1. Supporting HSA in performing any required troubleshooting of the production version of the new website, hosted on an Acquia platform.
2. Supporting HSA in working with the code of the new website, either to change the design of existing modules as delivered by Exygy or to create new modules.
3. Managing coding and technical design work, either to change the design of existing modules or to create new modules.
4. Providing support in reviewing, prioritizing, estimating and managing development requests related to the new website, either in changing the design of existing modules or in creating new modules.
5. Providing support in thinking through preliminary steps to integrate digital services into the new site.
6. Handling additional documentation tasks as requested by HSA's Digital Strategies Team.
7. Providing technical design and the implementation of specific functionality, potentially including but not limited to:
  - Enhanced search functionality, including the implementation of type-ahead functionality, tagging, "fuzzy logic," the ability to search attachments beyond .pdf's, and search filters;
  - Requested enhancements to Drupal's content management system;
  - Enhancements to the system for gathering and monitoring analytic data;
  - Implementation of additional modules to be used via the content management system.

#### Analytic Support (as needed)

Contractor shall further provide analytic support as will be supervised and prioritized by the Head of HSA's Innovation Office. Contractor will subcontract with a mutually

agreed, HSA-approved subcontractor that has expertise in analytic support; subcontractor will be approved by HSA. If a mutually agreed subcontractor cannot be found, HSA may decide not to continue with the analytic support portion of this contract. Tasks may include (but are not limited to, nor inclusive of) the following:

1. Review of analytic data gathered through Heap, Crazy Egg, Google Tag Manager, Analytics and any similar tools installed on the new website.
2. As requested by HSA, providing guidance – either ad hoc opinions or formal reports – based on the analytic review. This could include help in optimizing how users flow through the site or in performing A/B testing.
3. Provide design suggestions based on analytic review.
4. Provide expert opinions in how to collect, monitor, and operationalize analytic data going forward.
5. Conduct additional documentation tasks as requested by HSA.

**B. Phase II – Extended Support Tasks** *(as required/authorized by HSA)*

At the agency’s discretion and by mutual agreement between HSA and Exygy, Phase II support tasks may be required of Exygy or a mutually approved subcontractor, including providing content support, as supervised and prioritized by HSA’s Director of Communications.

1. In conjunction with HSA staff, the contractor or subcontractor will perform “deep dives” into program content and make recommendations as to the organization, display and text of each program’s web content going forward.
2. Continue to perform any of the content authoring and support tasks listed under Phase I of this contract.

At the agency’s discretion and by mutual agreement between HSA and Exygy, Exygy or a mutually approved subcontractor will provide support in Phase II for User Centered Design and Research, as supervised and prioritized by the Head of HSA’s Innovation Office.

Tasks that Exygy may be asked to perform include (but are not limited to, nor inclusive of) the following:

1. In conjunction with HSA staff, prepare research to support “deep dives” into program content to ensure that the organization, display and text of each program’s web content reflects the principles of user centered design.
2. Conduct User Experience testing as part of HSA’s “deep dives” into program content. Plan, schedule, execute and summarize testing and produce reports and recommendations based on the output of these tests.
3. Continue to perform any of the analytic support tasks listed under Phase I of this contract.

**V. Outcome Objectives**

The final website will meet the following success metrics:

1. 90% of users using a feedback form on SFHSA.org who comment on the quality of their experience will report a positive experience.

2. 90 % of users using a feedback form on SFHSA.org who comment on their ability to find what they were looking for reported that they found what they were looking for.
3. The website's search functionality will have a % of search exits in line with industry standards. Analytic tools will be installed on the website and will show that users are using the site for a variety of needs or 'user journeys' such as learning how to apply for, use, and maintain services.
4. Website's initial design will provide an easy-to-use platform for HSA and contractor to use in continuing to iterate website content and design based on ongoing user experience research.
5. Website's Drupal design will provide a strong and simple foundation that HSA's digital services team can use as a basis for ongoing engineering efforts.
6. Website's Drupal design will provide a strong foundation for integrating digital services when HSA is ready to take this step.
7. Team will deliver user-centered practices for creating content (i.e., style guide & design pattern library).
8. Website will have a responsive design that adapts to different digital platforms (i.e., desktop, tablet, mobile).
9. Website will be optimized for current and older browsers, including Internet Explorer, Safari, Chrome and Firefox.
10. Bounce rates will be in line with industry standards.
11. On-page code and site resources will be optimized for search engine ranking.
12. Website will encourage API development and use of [data.sfgov.org](http://data.sfgov.org).
13. Website will have a systematic process in place to enable the updating, editing and fact-checking of content.
14. Content team will have templates based on a style guide to help programs easily update content.
15. Website will meet all accessibility, usability and security standards at the business, City, County, State and Federal levels, and specified by HSA.
16. Team will have clear, accessible and detailed documentation throughout the teardown and rebuild of the website process, including how to migrate content from one environment to another and how to publish it.
17. Vendor will create and maintain development and testing environments and will assist in setting up the production environment, as needed.
18. Vendor will provide a "warm handoff" to HSA to maintain the website.

## VI. Reporting Requirements

1. As requested by HSA, the vendor will communicate at least weekly with the HSA staff member assigned to supervise and prioritize his or her work. This communication will take a form mutually agreed by HSA and the vendor and will include updates on services and deliverables as described in section "III. Description of Services / Deliverables". At minimum it will include updates on the consultant staff's name, hours and costs incurred as compared to consultant staff, hours and costs predicted for a services and deliverables as well as early notice of any foreseeable obstacles to completion of services and deliverables on time and within budget.

2. Vendor will provide reports to serve as official updates to track HSA projects in a database known as "CARBON." Reporting activities include, but are not limited to: personnel, overhead, and subcontractor costs.
3. The vendor will use HSA's online billing system, CARBON, to post invoices **monthly**. Invoices should be entered into CARBON by the 15<sup>th</sup> of the following month. For example, all the work done in April would be entered by May 15<sup>th</sup>. HSA's Project Manager will coordinate to ensure that time sheets and invoices are approved by the respective HSA staff member assigned to supervise and prioritize the work of each member of the contractor's team.
4. The vendor will provide Ad Hoc reports as required by HSA.
5. For assistance with reporting requirements or submission of reports, contact:

Jocelyn Everroad, Project Manager  
Human Services Agency - Policy and Planning  
170 Otis Street, 8<sup>th</sup> Floor  
San Francisco, CA 94103  
Email address: [jocelyn.everroad@sfgov.org](mailto:jocelyn.everroad@sfgov.org)

or

Elena Baranoff (Worker #GB24)  
Senior Contract Manager  
Human Services Agency  
PO Box 7988  
San Francisco, CA 94120  
Email address: [elena.baranoff@sfgov.org](mailto:elena.baranoff@sfgov.org)

**Appendix B - Calculation of Charges**  
**Exygy, Inc.**  
**Rebuilding SFHSA.org Website**  
**July 1, 2017 - June 30, 2018**

**Phase I - Content Support (7/1/17-8/31/17)**

Task	Provider	Hrs/Wk	Hrs/Month	# of Mos	Total Hrs	Hrly Rate	Total
Content Support	Subcontractor	30	120	2	240	\$185	\$44,400 *
Technical Support	Exygy	20	80	2	160	\$185	29,600
Analytic Support	Subcontractor	-	10	2	20	\$185	3,700
Extra Hours 'Bank'	Subcontractor	-	-	-	15	\$185	2,775
<b>Subtotal</b>							<b>\$80,475</b>

**Phase II - Extended Support Tasks (9/1/17-6/30/18)**

Task	Provider	Hrs/Wk	Hrs/Month	# of Mos	Total Hrs	Hrly Rate	Total
As needed support	Exygy and Subs	as needed		10	1351	\$185	\$250,000

<b>Total Contract</b>	<b>\$330,475</b>
<b>10% Contingency</b>	<b>\$33,048</b>
	<b><u>\$363,523</u></b>
<b>Total Not to Exceed</b>	<b>\$363,523</b>

\*Payable per provision of services.

- A. Contractor shall submit invoices on a monthly basis in CARBON (Contract Administration, Reporting, and Billing Online). Invoices shall detail the services provided, the staff providing the service, the number of hours provided, and the dates of service provision.
- B. Contractor shall submit Monthly Status Reports (either oral or written) to the Program Manager, prior to submitting invoices. Program Manager will verify that the work as outlined in the scope of services, or as agreed upon in weekly communications, has been completed, per HSA's specifications. Verification and approval of the work detailed in the Monthly Status Reports and any invoices submitted to the contractor by the subcontractor are required for payment.
- C. The total amount of this budget is **\$330,475**. Contingent amount of \$33,048 may be available, at the City's sole discretion.
- D. The total amount of the contract shall not exceed **\$363,523**.