

**Q&A Responses for Formal Request for Proposals for
Support DAHLIA SF Housing Portal Web Design, Development, and Maintenance
Sourcing Event 000008580**

These are the responses to all questions submitted prior to the questions deadline for the San Francisco Mayor's Office of Housing and Community Development's solicitation for support of the DAHLIA SF Housing Portal web design, development, and maintenance. No further questions about the RFP may receive a response. Questions about the RFP process may be answered at any time. Please pose such questions by email only to michael.solomon@sfgov.org.

We have tried to answer all questions as clearly as possible. If anything remains unclear, you may base your responses on your own suitable assumptions – make sure you are clear about the assumptions being made so the proposal evaluators understand the context.

QUESTIONS AND ANSWERS

(Similar questions with similar answers have been grouped together)

QUESTION 1

What key performance indicators (KPIs) or metrics have been identified to evaluate the success of the platform?

How does MOHCD measure the success or effectiveness of the portal?

Does MOHCD have any analytics or metrics in place to measure the project success criteria?

Have any user research activities been undertaken, encompassing both quantitative and qualitative methods? May we have access to the compiled findings?

ANSWER 1

Our KPI's include:

- Number of different kinds of devices used and system responsiveness
- Number of errors on applications
- Ratio of online applications vs paper applications
- Number of qualified vs unqualified applicants submitting applications
- User satisfaction level from online feedback form and communicated comments
- Number of users viewing info and applying under multiple languages

Most of the user research takes place prior to development of new public facing features and functionality to help ensure accessibility, understandability, and usability. User research findings will be shared with the Contractor.

QUESTION 2

What does quality mean to you? What criteria make up a high-quality product?

ANSWER 2

These are questions we would like respondents to address in the submitted proposals.

QUESTION 3

Are there any specific challenges or feedback received from users or partners regarding the current system?

ANSWER 3

While most feedback we have received has been positive, some of the challenges we have received in the form of feedback from users include difficulty in finding certain resources, not liking having to answer the same questions on different applications for different listings (this may be related to not realizing setting up and signing into an account when applying results in some answers being prefilled on applications), not understanding how the DAHLIA lottery works, applying many times without ever winning a housing lottery, not enough photos on listings, and some functionality is too high-tech for some users (they may not realize we provide resources throughout the City to help users who need it).

QUESTION 4

Is there anything else that you consider critical for the success of this project?

ANSWER 4

All critical items are included in the Request for Proposals details document.

QUESTION 5

Could you elaborate on the key stakeholders' vision for the portal and describe how they are contributing input into its development?

ANSWER 5

The key stakeholders' vision is spelled out in the Solicitation document in Appendix A "Scope of Work," section 5 "Project Success Criteria" as follows: "The product shall continue to streamline and simplify the process of searching and applying for affordable housing in the City, making it easier to rent, buy, and stay in San Francisco. It will create a great experience for residents who need housing and housing assistance by providing "one-stop shopping" for all affordable housing resources in the City. It will also continue to provide robust tools to MOHCD partners for administration of Listings, Applications, Lotteries, Lease Ups, etc." The section goes on to describe specifics around important aspects of the vision including important accessibility and usability standards.

The Product Manager and development team regularly meet with management and subject matter expert stakeholders so they may provide business requirements, testing, and feedback. In addition, subject matter experts communicate with the development team via Slack.

QUESTION 6

What procedural steps will be undertaken to formalize a partnership with San Francisco Digital Services?

ANSWER 6

The Mayor's Office of Housing and Community Development and Digital Services are already in an ongoing formalized partnership for this project, and our partner vendors are considered part of that as far as the DAHLIA SF Housing Portal project is concerned. In addition, as noted in Section E "Cooperative Agreement" of the Solicitation, "Any other City department, public entity or non-profit made up of multiple public entities, may use the results of this Solicitation to obtain some or all of the commodities or services to be provided by Proposer under the same terms and conditions of any contract awarded pursuant to this Solicitation."

QUESTION 7

What roles should be assumed by the Client and the Contractor in decision-making processes concerning the product and its operation?

ANSWER 7

The Client and Contractor will work cooperatively as partners in decision-making via Sprint Plannings, testing results, user research, and constructive feedback. Final decisions will ultimately be the City's and based mostly on stakeholder requirements and feedback.

QUESTION 8

What task-tracking system is currently in use? Is there an option to integrate Atlassian Jira?

ANSWER 8

We use Atlassian Jira.

QUESTION 9

What is your preferred method and frequency of communication? Is the Scrum approach applicable to your development model?

ANSWER 9

We are following an agile process with two-week sprints during which we hold daily Scrums, Sprint Plannings, Sprint Reviews, and Sprint Retros. Other meetings are organized as needed, and we regularly communicate via Slack and email.

QUESTION 10

Based on RFP, this seems staff augmentation requirement, please correct us if that is incorrect. If so, do you expect all members to be local? Will you accept remote team members?

ANSWER 10

There is no expectation that all team members be local – remote team members are fine. Most of our meetings are via MS Teams.

QUESTION 11

Do you have any minimum to maximum engineer requirements for this RFP?

ANSWER 11

No

QUESTION 12

How does MOHCD prioritize the listed "Nice to have skills"?

ANSWER 12

The "Nice to have skills" as noted in Appendix A of the Solicitation may be prioritized as:

- Experience working with Agile development processes, including daily scrums and iterative development/feedback cycles.
- Ability to communicate technical concepts to technical and non-technical audiences.
- Experience maintaining a production application using Heroku, Papertrail, Sentry, New Relic or similar tools.

QUESTION 13

What is the budget of the project?
Is there a budget range for this project?

ANSWER 13

Per the Solicitation Section I, C "Anticipated Contract Not to Exceed Amount," the not to exceed ("NTE") amount for a contract awarded pursuant to this Solicitation cannot be anticipated at the time of this Solicitation but shall be based on the selected Proposal. This amount is based on City's estimated spend over the advertised contract term. Should City's actual spend exceed its estimated spend, City may in its sole discretion increase the contract NTE accordingly.

Rather than base your estimates on current system details/functionalities and a specific budget, you can describe in your proposal your hourly and/or blended rates for all services anticipated to be necessary to provide the services in this Solicitation, including rates by position, type of work, on shore vs off shore, ongoing maintenance, etc. as applicable.

If any of your responses require specifics not provided, we recommend you state your answer in the context of your understanding of the RFP content and scope. You may base your responses on your own suitable assumptions – if you do so, make sure you are clear about the assumptions being made so

proposal evaluators understand the context.

QUESTION 14

List the URLs which are part of the scope.

ANSWER 14

For the production versions of the public facing and partner sites, the following URLs are part of the scope:

- housing.sfgov.org
- partner.housing.sfgov.org

QUESTION 15

Whether the content writing or copy writing services is part of the RFP?

ANSWER 15

Content or copy writing will be handled primarily by the City; however, there may be times the Contractor may be asked to contribute towards some content creation if necessary for the assigned development work.

QUESTION 16

Do you need any content migration service?

ANSWER 16

No

QUESTION 17

Is website hosting a part of the scope?

ANSWER 17

No

QUESTION 18

Is there an estimated start / end date for this project?

ANSWER 18

The project based on this Solicitation is estimated to start by the end of October, 2023. As for an end date, it is difficult to estimate because implementations are ongoing and based on current priorities established at Sprint Planning meetings. When it is time to start ramp-down in Contractor hours, and if it is necessary to ramp back up, we will plan with the Contractor such that there is enough advance notice to coordinate resourcing – we understand it can take weeks or months to ramp-up a team and will organize accordingly.

QUESTION 19

How many UX/UI designers does the MOHCD currently have working on this project?

ANSWER 19

One

QUESTION 20

Are there any agencies / consultants working on the User experience and usability aspects of DAHLIA?

ANSWER 20

Yes.

QUESTION 21

Is the vendor that first designed and developed DAHLIA still involved in this project?

ANSWER 21

Yes

QUESTION 22

Given your current understanding of the scope of work, how many of the hours involved are design (user research, workflow design, user experience, UI) vs development (writing code, testing code, compliance work, etc)? If hours are hard to estimate, based on what you know now, what percentage of the work would you attribute to design and what percentage would you attribute to development?

ANSWER 22

Based on 2 designers and 6 engineers when we are fully staffed, we estimate a 1:3 ratio for design/research to development.

QUESTION 23

Could you specify the target user segments for the website? Are there any particular demographic profiles or user groups that the platform aims to serve?

ANSWER 23

The target users are residents of San Francisco seeking assistance towards homeownership and/or rental housing under our affordable housing programs. We aim to provide the services to as diverse populations as possible. Our other target users are our Partners, such as housing counselors and lease/sales agents.

QUESTION 24

What preliminary customer journey mapping has been developed to outline how users interact with the service from their entry point to the end result? (How end users find out about the platform).

ANSWER 24

The main ways end users find out about the platform are from MOHCD's website (sf.gov/mohcd), housing counselors, word of mouth, inquiries to MOHCD via phone/email, and by receiving our Housing Alert emails notifying subscribers of new homeownership and rental listings.

QUESTION 25

Could you identify and define the various user roles within the system?

May we request a glossary outlining the existing entities within the system?

Could you disclose the current number of registered users on the portal in the Production environment?

ANSWER 25

The main user roles within the DAHLIA SF Housing Portal web app system include:

- Seekers of San Francisco affordable housing program properties and services (public users)
- Housing Counselors
- Leasing Agents
- Sales Agents

We are working on a system-wide glossary, but do not have one to provide at the current time.

Assuming "registered users" means those public users who set up accounts on the DAHLIA SF Housing Portal, the number of unique user accounts is approximately 83,000.

QUESTION 26

How many users, on average, access the DAHLIA San Francisco Housing Portal each month?

ANSWER 26

There are on average approximately 120,000 user sessions and 700,000 page views each month.

QUESTION 27

How do partners with the Ministry [sic] of Housing and Community Development (MOHCD) currently interact with the system to manage applications, formulate and view pricing and marketing plans, administer lease-up procedures, and monitor status metrics?

ANSWER 27

There is a limited set of online tools our partners currently use:

- Partners Portal at partners.housing.sfgov.org for Leasing Agent partners to enter paper applications for their listings and then process lease-ups after the lottery. This currently works for rental programs. Ownership programs will be added in the future.

- Lenders Portal is Salesforce based and is used by our Lending partners under our downpayment assistance programs for homeownership to upload and keep track of required loan documents.
- Annual Reporting Portal for our Property Manager partners to complete and submit required annual reporting of household numbers and incomes for each unit under MOHCD programs.

Pricing and Marketing Plan formulations and viewings are not yet integrated into the system.

QUESTION 28

Is there a requirement for an administrative interface or dashboard as part of the platform's backend?

ANSWER 28

Not at this time for the front-end developers.

QUESTION 29

Could you enumerate the user flows that are slated for migration from AngularJS to React? Are there additional features or functionalities that will be introduced during this reimplementing process? If so, could you briefly outline these new features and specify within which user flows they will be utilized?

ANSWER 29

We are working on deploying the listing details and get assistance pages (see housing.sfgov.org). Remaining are the applications and accounts. During reimplementing, upgraded and new functionality/features are added when it makes strategic sense to do so. As with all our development, new functionality/features are determined on a sprint-by-sprint basis.

QUESTION 30

Are third-party integrations used on the platform? Is it possible to see a list of these integrations? Are there any other third-party integrations, besides Salesforce, that the web portal interacts with?

ANSWER 30

- EasyPost
- GitHub
- Heroku
- AWS
- Prerender.io

QUESTION 31

What are your data security requirements?

ANSWER 31

See Attachment 1 - Proposed Agreement Terms, Article 13 “Data and Security.” Also, as per the Solicitation’s Section XII G, “Cybersecurity Risk Assessment,” the City may require a SOC 2 Type II report and/or completion of the City’s CyberRisk Assessment questionnaire to be evaluated by the City’s CyberRisk team.

QUESTION 32

What are the current requirements for the infrastructure? Will these requirements change in the foreseeable future?

ANSWER 32

For the associated Salesforce instance, we use connected apps, with a combination of a custom API written with Apex and the built-in Salesforce rest API.

Also:

- Heroku
- AWS
- Redis
- Postgres
- Memcache

There is no current plan for these requirements to change in the foreseeable future, however, we must remain open to changes as deemed necessary based on system needs, performance, etc.

QUESTION 33

How is the delivery process currently organized, specifically the DevOps aspect? Are there any requirements or requests for improvements regarding deployment?

ANSWER 33

We have a CI / CD pipeline that handles building and testing our application. We use Heroku to deploy it to various environments. For improvements, we are looking into improving the flakiness of some of our tests and improving our branching strategy.

QUESTION 34

Are there any known limitations or challenges with the Salesforce backend database that should be addressed?

ANSWER 34

There is a limit to number of API calls per day and amount of storage available for attachments uploaded via the housing portal and saved in Salesforce; however, those limits are monitored and addressed as needed by the Salesforce development team.

QUESTION 35

How often does MOHCD anticipate code deployments to production?

ANSWER 35

Generally, there are code deployments at least by the end of our two-week sprints. The deliverables and expected code deployments, if any, are determined during Sprint Planning prior to each sprint.

QUESTION 36

Are there any tools or platforms MOHCD prefers for automated testing, continuous integration, and deployment?

ANSWER 36

MOHCD has no particular preference.

QUESTION 37

Will you provide branding and styling guidelines?
Are there existing designs for DAHLIA that need to be implemented as part of this project? Can you share those or some examples?

ANSWER 37

There are style guides which will be shared with the Contractor. To get a sense of the styling, visit housing.sfgov.org

QUESTION 38

Can you provide an anticipated timeline for the release of upcoming functionalities, assuming that the production process remains uninterrupted?

ANSWER 38

We are following an agile process with two-week sprints, so releases are ongoing and based on current priorities established at Sprint Planning meetings.

QUESTION 39

Are there any plans to expand the services or functionalities offered through the portal beyond what's currently mentioned?

ANSWER 39

There may be additional services or functionalities added to the development plans as business needs and other factors like government regulations evolve.

QUESTION 40

The project success criteria lists an extensive number of features and functionalities as well as possible future features and functionalities – how many of these are improving on existing features and functionalities vs designing and coding new features and functionality?

What is the ratio between features that are designed and require implementation and those yet to be designed?

ANSWER 40

As the needs for future features and functionality are based on evolving business requirements, changing and new regulations, etc., there is not a set number of future requirements. If we estimate based on the current features/functionality vs planned features/functionality, it is approximately a 1:3 to 1:4 ratio.

QUESTION 41

Could you provide insights into device usage statistics, categorizing among mobile, tablet, and desktop platforms? Is it possible to share the analytics data?

ANSWER 41

The vast majority of our public facing website users are accessing the system via mobile devices (approximately 70-80%), so our interfaces are designed to be responsive and mobile-first.

QUESTION 42

Is there available statistics for support center appointments? May we know the format in which this data is stored?

ANSWER 42

We do not have support center appointments.

QUESTION 43

Is there any bid bond and performance bond?
Is a bond required for this project?

ANSWER 43

No

QUESTION 44

Is LBE criteria is mandatory to bid on this RFP?

ANSWER 44

No

QUESTION 45

Is it a global contract or only US based companies can participate?

ANSWER 45

Anyone can participate keeping in mind that getting into contract with the City and County of San Francisco requires becoming a City Vendor and compliance with all City Vendor rules. For detailed information, please see:

[Becoming a City Vendor](#)

[Qualify to Do Business \(with the City\)](#)

Miscellaneous

QUESTION 46

Яка процедура після виграшу лотереї

ANSWER 46

Данный запрос предложений не включает лотерею