



RFP #22-013 Behavioral Economics and Website Development Firm

Addendum #1

Responses to Questions:

The following questions were submitted by the deadline and are answered in this addendum.

Question #1: Our firm is not located in California, or the United States: would we still be eligible to bid?

Answer #1: Yes, a firm outside of California and the US is eligible to bid.

Question #2: Migration: Will you require migrating content from the old site to the new site? If yes, do you have an idea of what content sections you may want to migrate? (i.e., pages, sections, etc.)

Answer #2: This will depend on the timeline proposed by the submitter as we are also redesigning the site.

Question #3: Do you know approximately how many pages your current site has?

Answer #3: This can be determined by walking the site.

Question #4: Is there a desire to keep the same page count or are you open to pruning the site and removing pages that are no longer needed/not receiving traffic?

Answer #4: There is no desire to keep the same page count.

Question #5: We noticed many pages of the site are dedicated to OAK Police Dept. <http://www.oakha.org/OHAPD/Pages/default.aspx>. Are these sections you would like to keep, prune or add to?

Answer #5: This will need to be determined during the discovery phase.

Question #6: Are you currently using an email marketing platform that will need to get integrated into the new site so people can sign up for your electronic newsletter through your website? If so, which platform and are wanting to stay with this platform or are you open to changing the platform?

Answer #6: Yes, Constant Contact. Staying with the platform will have to be determined during the discovery phase of the project.

Question #7: Would like to add an Online Contact/Request Form to your website?

Answer #7: This will need to be determined during the discovery phase.

Question #8: Do the online forms need to integrate to a CRM (i.e., Salesforce, Hubspot, etc.)? If so, which CRM are you using?

Answer #8: Online forms are currently used in applicant, tenant and landlord portals using a SaaS developed by Yardi Systems. Some forms are also accessed through a forms portal using an on premise version of Laserfiche.

Question #9: Would like a Calendar of Events Custom Plugin to remove Events 2+ years old?

Answer #9: Yes, to calendar of events. The removal of older events needs to be determined during the discovery phase.

Question #10: Job Listings/Employment Portal: We noticed you are using Workforce ADP, Assume you would like to stay with this platform?

Answer #10: Yes, we would like to stay with this platform.

Question #11: Would The Authority like Search Functionality?

Answer #11: Yes, we would like Search Functionality

Question #12: Would The Authority like Social Media Integration?

Answer #12: Yes, we would like Social Media Integration.

Question #13: Would you like Google Analytics Integration?

Answer #13: Yes, yes we would like Google Analytics Integration.

Question #14: Would you like survey integration to website?

Answer #14: Yes, we would like survey integration.

Question #15: Looks like you have a gated section, Login link on the footer. Can you please explain what the purpose is and if this is part of the scope of the project?

Answer #15: This is for content management. It will not be included on the new design.

Question #16: How are the Users stored/managed? Is this for website Managers (i.e. not regular Users?) or is this a Private portal for specific users?

Answer #16: This is for content management. It will not be included on the new design.

Question #17: What is the Registration form/process and how many pages are gated?

Answer #17: This is for content management. It will not be included on the new design.

Question #18: Will you need language translations included in this proposal or simply the option to add in the future?

Answer #18: This will need to be determined during the discovery phase.

Question #19: If you require translations as part of this proposal, which languages will you need?

Answer #19: This will need to be determined during the discovery phase.

Question #20: Will you be working with a translation agency to provide translations or do you need referrals?

Answer #20: This will need to be determined during the discovery phase.

Question #21: If you use a translation agency which would you prefer, Google Translate, which is no additional cost, but has poor quality translations or WordPress which has higher quality translations, but has a higher cost to build and maintain?

Answer #21 # This will need to be determined during the discovery phase.

Question #22: Do you have information on how many “monthly” visitors your site gets? (Ideally data from past year, but if not possible a general sense would be helpful)

Answer #22: This will need to be determined during the discovery phase.

Question #23: Do you know the # of page views/ month? (i.e. how many unique page views are there, and therefore pages loading from the server)

Answer #23: This will need to be determined during the discovery phase.

Question #24: Do you know your current server bandwidth?

Answer #24: It is 1 Gbps.

Question #25: What is your estimated budget for this project and do you already have money set aside?

Answer #25: We are not able to provide budgetary information, but this is budgeted and funded project.

Question #26: Is the main executive sponsor for this project from Information Technology, Communications, or another department?

Answer #26: Communications is the main executive sponsor.

Question #27: Who will be responsible for evaluating responses (people and/or roles)?

Answer #27: As per Section 4.4 Selection Process, Paragraph B, Evaluation Committee, “The Authority anticipates that it will select a minimum of three (3) people to serve on a committee to evaluate each of the responsive Proposals submitted in response to this RFP. PLEASE NOTE: No proposer shall be informed at any time during or after the RFP process as to the identity of any Evaluation Committee Member.”

Question #28: What departments are stakeholders in this project?

Answer #28: All departments of the Authority are stakeholders of this project.

Question #29: Who built your current site, and when was the last refresh?

Answer #29: Fuselideas.com built the current site and the last refresh approximately 7 years ago.

Question #30: Do you have a preference for a highly secure, open-source CMS like Drupal?

Answer #30: We do not have a preference.

Question #31: Please describe your current hosting setup. Are you interested in hosting services?

Answer #31: Please refer to the scope items.

Question #32: Who currently provides you with ongoing support services?

Answer #32: Internal staff provides ongoing support services.

Question #33: Are you looking for ongoing maintenance and developer support?

Answer #33: Yes, for maintenance and developer support.

Question #34: Do you have a separate budget for hosting and ongoing support?

Answer #34: No, the Authority does not have a separate budget for hosting and ongoing support.

Question #35: Please describe your technical / IT staff. How many members do you have and what is their level of experience, particularly with Drupal and/or PHP. This helps us determine the level of support you may require.

Answer #35: Internal staff will require training for updating page copy. Beginner experience for Drupal and/or PHP.

Question #36: What is your monthly total Bandwidth?

Answer #36: This will need to be determined during the discovery phase.

Question #37: What are your monthly page views?

Answer #37: This will need to be determined during the discovery phase.

Question #38: What are your monthly hits (e.g. html, css, js, images, docs)?

Answer #38: This will need to be determined during the discovery phase.

Question #39: What is your CMS Number of content pages?

Answer #39: This can be determined by walking the site.

Question #40: What is your CMS Database size?

Answer #40: This will need to be determined during the discovery phase.

Question #41: What is your CMS File asset size?

Answer #41: This will need to be determined during the discovery phase.

Question #42: Can you please confirm the open source platform Oakland intends to implement is WordPress? (or another CMS?)

Answer #42: We do not have a preference in regards to a CMS.

Question #43: Is the 10-year Applied Behavioral Economics experience a firm requirement? Would the Authority consider the following expertise of the following staff profiles: (1) 8years of applied behavioral economics and social work experience; (2) 10+ years of experience in user research; (3) 10+ years of experience in brand research and perception studies?

Answer #43: This is a firm requirement.

Question #44: Does the Authority prefer to work with a vendor based in Oakland?

Answer #44: The Authority does not prefer a vendor to be based in Oakland.

Question #45: Does the Authority have a current branding style guide? If so, do you expect any changes to it before the redesign?

Answer #45: Yes. This will need to be determined during the discovery phase.

Question #46: Given that a change in messaging and behavior change will require new content, does the Authority intend to include content writing support as part of this contract?

Answer #46: The Authority will provide content and selected firm will work with the Communications Department to make sure that the content has an overall consistent look and feel.

Question #47: What level of accessibility is the Authority targeting? We recommend WCAG 2.1 AA

Answer #47: At the minimum the Authority requires that the accessibility meet the Authority's Language Assistance Plan (LAP) for Limited English Proficiency (LEP) Persons which is attached to this addendum.

Question #48: Will the Authority please ensure at least 10 business days from the time Answers are published to the proposal deadline?

Answer #48: The Authority cannot ensure at least 10 days from the time the answers are published to the proposal deadline, but can ensure enough time to update and submit a proposal.



Oakland Housing
Authority

RFP #21-022 Investment Consulting Services

Addendum #1

Proposer hereby acknowledges this addendum:

Name of Firm: _____

Authorized Signature: _____

Date: _____

Acknowledgement of this Addendum MUST be included with your proposal.

APPENDIX G

Language Assistance Plan (LAP) for Limited English Proficiency (LEP) Persons

Introduction

The Oakland Housing Authority (OHA) is committed to providing equal opportunity housing in a non-discriminatory manner, and in complying fully with all Federal, State and local nondiscrimination laws and with the rules and regulations governing Fair Housing and Equal Opportunity in housing and employment. OHA also complies with the Executive Order 13166 and Final Guidance to Federal Assistance Recipients Regarding Title VI Prohibition against National Origin Discrimination Affecting Limited English Proficient (LEP) Persons, published January 22, 2007, in the Federal Register.

The purpose of the LAP is to identify how OHA will ensure its methods of administering its programs will not have a discriminatory effect on self-identified LEP persons and to ensure within reason that LEP persons have full access to OHA programs and services. The LAP also describes the method OHA will undertake to ensure the provision of meaningful access through language services to LEP persons. In addition to a four factor analysis, this plan will discuss:

1. Identifying LEP individuals who need language assistance services
2. Language Assistance Measures
3. Effective noticing and outreach methods to reach the LEP community
4. Staff training
5. Determining vital documents
6. Monitoring and updating the LAP

Who is LEP?

Anyone whose primary language is not English and has a limited ability to read, write, speak or understand English may be LEP. OHA will not identify anyone as LEP; the beneficiaries of the services and activities must identify themselves as LEP (Federal Register Vol. 72, No. 13, January 22, 2007).

Four Factor Analysis

Based on HUD guidance, OHA conducted a four factor analysis of its jurisdiction using Census and local data to determine the extent of its obligations to provide language access to LEP persons. The four factor analysis is based on the following factors:

Factor 1: The number or proportion of LEP persons served or encountered in the eligible service population (“served or encountered” includes those persons who would be served or encountered by the recipient if the persons were afforded adequate education and outreach)

Factor 2: The frequency with which LEP persons come into contact with the program

Recipients should assess, as accurately as possible, the frequency with which they have or should have contact with an LEP individual from different language groups seeking assistance. The more frequent the contact with a particular language group, the more likely the need for enhanced language services in that language. The steps that are reasonable for a recipient that

serves an LEP person on a one-time basis will be very different than those expected from a recipient that serves LEP persons daily. It is also advisable to consider the frequency of different types of language contacts.

Factor 3: Analyze the importance of contact

“The more important the activity, information, service, or program, or the greater the possible consequences of the contact to the LEP persons, the more likely the need for language services. The obligations to communicate rights to a person who is being evicted differ, for example, from those to provide recreational programming. A recipient needs to determine whether denial or delay of access to services or information could have serious or even life-threatening implications for the LEP individual. Decisions by HUD, another federal, state, or local entity, or the recipient to make a specific activity compulsory in order to participate in the program, such as filling out particular forms, participating in administrative hearings, or other activities, can serve as strong evidence of the program’s importance.”

Factor 4: Identify the resources available to the grantee/recipient and the costs

“A recipient’s level of resources and the costs that would be imposed on it may have an impact on the nature of the steps it should take. Smaller recipients with more limited budgets are not expected to provide the same level of language services as larger recipients with larger budgets. In addition, “reasonable steps” may cease to be reasonable where the costs imposed substantially exceed the benefits. Recipients should carefully explore the most cost-effective means of delivering competent and accurate language services before limiting services due to resource concerns.”

Element 1: Identifying LEP individuals who need language assistance services

According to HUD guidance, “One factor in determining what language services recipients should provide is the number or proportion of LEP persons from a particular language group served or encountered in the eligible service population. The greater the number or proportion of these LEP persons, the more likely language services are needed. Ordinarily, persons ‘eligible to be served, or likely to be directly affected, by’ a recipient’s program or activity are those who are served or encountered in the eligible service population.” Meeting the following HUD suggested thresholds will be considered strong evidence of compliance with the OHA’s written-translation obligations:

Threshold	Written Translation
1,000 or more in the eligible population in the market area or among current beneficiaries	Vital Documents
More than 5% of the eligible population or beneficiaries and more than 50 in number	Vital Documents
More than 5% of the eligible population or beneficiaries and 50 or less in number	Translated written notice of right to receive free oral interpretation of documents
5% or less of the eligible population or beneficiaries and less than 1,000 in number	None required.
Source: Federal Register / Vol. 72, No. 13 / Monday, January 22, 2007 / Notices	

Based on the safe-harbor thresholds described in Table 1:

(Oakland, CA CDBG, HOME, ESG) Jurisdiction			
Limited English Proficiency (LEP) Language			
#1 LEP Language	Spanish	41,928	11.30%
#2 LEP Language	Chinese	19,815	5.34%
#3 LEP Language	Vietnamese	4,170	1.12%
#4 LEP Language	Tagalog	2,097	0.56%
#5 LEP Language	Other Asian Language	1,587	0.43%
#6 LEP Language	African	1,533	0.41%
#7 LEP Language	Cambodian	1,269	0.34%
#8 LEP Language	Arabic	1,011	0.27%

Staff maintains a log of interactions with LEP persons monthly. The data collected for January through February 2017 notes:

Incoming Requests for LEP Assistance	
Cantonese	96
Spanish	55
Vietnamese	21
Mandarin	17

While there are 8 languages in the population that meet or exceed suggested thresholds identified by HUD as safe harbor, there is limited contact with LEP persons in groups other than Spanish, Chinese, and Vietnamese. Additionally, the frequency of contact with Chinese speakers is significant for the Cantonese and Mandarin dialects. As such, for the purposes of the LAP, Spanish, Cantonese, Mandarin, and Vietnamese will be considered the primary LEP languages into which OHA will provide access to oral interpretation through staff and written translation. OHA will provide the widest array of translation and interpretation services to LEP persons in the primary LEP languages while balancing the costs and resources available to the agency. OHA also will provide assistance in other languages through contracted interpretation services as discussed in Element 2.

An analysis to identify changes in the LEP population for the jurisdiction will be conducted as new data becomes available.

Element 2: Language Assistance Measures

OHA will provide multiple methods of assistance to LEP persons to ensure equitable access to OHA programs.

- 1) Oral interpretation assistance for LEP persons, as needed and requested
 - a. Automated telephone menu option translations in primary LEP languages
 - b. Multilingual staff to provide oral interpretation assistance in the four primary languages identified by the four factor analysis
 - c. Contracted interpretation services to offer interpretation assistance in at least 150 languages
 - d. "I Speak" cards
- 2) Written translation services
 - a. Vital documents in each of the primary LEP languages
 - b. Some identified non-vital documents

Oral Interpretation

Callers to the Authority's automated phone system will be presented with menu options in English, Mandarin, Cantonese, Spanish and Vietnamese. Answers to FAQs will be provided via the automated phone system, as well as instructions on how to receive further assistance with oral interpretation. The Authority will utilize "I speak" flash cards to identify the language spoken by walk-in LEP clients. Once identified, OHA will utilize certified bilingual employees or a telephone interpretation service to assist walk-in clients. The use of a telephone interpretation service will enable the Authority to provide assistance to walk-in clients in over 150 languages.

Where reasonable, oral interpretation is available in the following instances if requested by LEP clients prior to their appointment:

- Intake and Interview Process
- Applicant Review
- Voucher Briefing
- Participant Counseling Sessions
- Participant Hearings
- Annual and Interim Re-examinations
- Housing Quality Standards Inspections

Where reasonable, oral interpretation is available for the following voluntary activities if requested by LEP clients prior to the activity:

- Family Self-sufficiency (FSS) Briefing
- Homeownership Briefing
- Resident Advisory Board Meetings
- Board of Commissioner's Meetings

OHA maintains a list of bilingual staff to assist LEP clients. Bilingual staff who will provide interpretation must either be certified by passing a required test, which will be facilitated by OHA's Human Resources Department. If a bilingual staff person is not available the Authority will utilize a contracted telephone interpretation service.

OHA discourages LEP persons from enlisting the services of family members or other informal interpreters. OHA staff will always rely on the assistance of staff or contracted interpretation services vendors to provide oral interpretation services. In the case where an LEP program participant refuses OHA's free language assistance services, staff will document the offer and the rejection in the electronic notes.

Written Translation

Written translation is the replacement of a written text from one language into an equivalent written text in another language. OHA will provide written translation of vital documents into primary LEP languages. OHA may also provide written translation of some non-vital documents based on an assessment of the content and audience of the information provided.

Oral interpretation services will be used for any non-vital document that has not been translated.

All housing related programs are considered vital to participants and the public. Other programs not directly related to housing or that may affect someone's right to housing are considered non-vital. While the accessibility to non-vital programs is important, it is not subject to the same standards as housing programs. Examples of OHA programs that are considered non-vital include:

- Section 3
- Human Resources
- Procurement
- Community Outreach

LEP assistance in accessing these programs may be offered through the use of bilingual employees and cost effective written translation programs available through OHA's website. Notice of these services will be provided on the OHA website.

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Written Translation

Written translation is the replacement of a written text from one language into an equivalent written text in another language. OHA will provide written translation of vital documents into primary LEP languages. OHA may also provide written translation of some non-vital documents based on an assessment of the content and audience of the information provided.

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Element 3: Determining Vital Documents

HUD has defined “vital documents” to be those documents that are critical for ensuring meaningful access or awareness of rights or services, by beneficiaries or potential beneficiaries generally and LEP persons specifically. The Executive Director or his designee will identify vital documents for program applicants and participants and ensure translation of these documents into the languages identified in the four factor analysis. The list of vital documents will be maintained by the Executive Office and revised as business needs change. OHA will accept recommendations on the need to translate certain documents during the public comment period of the MTW Annual Plan.

Approved vendors will be utilized for written translation services. Where possible, certified bilingual staff will be used to review translated documents for accuracy and OHA may use the HUD-approved version of translated documents.

A sampling of OHA identified vital documents is as follows but this list is not exhaustive and OHA expects the list to change over time as program operations evolve:

- 1) Site –based Wait List Opening Notices, pre-applications, and applications
- 2) Eligibility intake forms
- 3) Briefing packet materials
- 4) Lease and house rule materials
- 5) Consent and Complaint forms
- 6) Written notices regarding Rights, Hearing and Denial or Termination of services
- 7) FSS Contract and Outreach Materials
- 8) Required Homeownership Forms and Materials
- 9) FAQs
- 10) Reasonable Accommodation Request Forms and Information
- 11) Annual and Interim Recertification Packets

While OHA will provide written translation of vital documents, the English form will serve as the official record for the participant file.

Element 4: Effective Noticing and Outreach Methods to Reach the LEP Community

OHA will use various communication strategies to provide notice of the LAP and the oral interpretation and written translation services that are available free of charge. In addition to posting the LAP on the OHA website and in the MTW Annual Plan, OHA will place multilingual signs or posters in common areas and offices to inform the public that OHA provides free interpretation services. Similar notices will also be placed in outreach materials published for OHA's housing assistance programs..

Significant outreach efforts, such as the opening of any of the Authority's wait lists may include notices in newspapers in languages that serve non-English speaking populations and also on non-English language radio and television outlets. OHA will also notify and, where possible, work with local libraries, schools, community and faith-based organizations that work with LEP groups in any outreach efforts.

A "tag line" notice will be included on the website home page, community and public notices, and other identified correspondence from OHA advising clients that free interpretive services are available. The tag lines will also provide information on how to access these services.

Element 5: Staff Training

All staff that frequently interacts with the public will be provided a copy of the LAP. Specific training will be tailored to the job responsibilities of staff and frequency of contact with applicants and residents. Trainings may include:

- An in-depth discussion of the LAP,
- Types of services available to LEP persons,
- How to respond to LEP callers,
- How to respond to LEP clients who contact the Authority in-person,
- How to respond to written communications from LEP clients,
- How to use the “I speak” cards,
- How to access contracted vendor translation services,
- Identifying and accessing certified bilingual staff,
- Location of translated documents, and
- How to document language assistance services offered and provided to LEP persons.

Certified bilingual staff will receive additional training that will address:

- Adhering to the role of interpreter without deviating into a role as counselor, legal advisor, or others.
- Acquiring specialized knowledge of programs and services
- Maintaining confidentiality when translating

Certified bilingual staff may also receive further training in translation skills.

Element 6: Monitoring and Updating the LAP

The LAP is monitored regularly and may be modified at least annually during the MTW Annual Plan process. Modifications to the LAP will be based on:

- New or updates Census data
- Changes in language demographics and LEP households that meet the safe harbor thresholds
- Frequency of encounters and other data regularly reported
- Compliance with federal policy
- Compliance with MTW statutory requirements
- Current and anticipated client needs
- Availability and necessity of resources