Analysis of Austin City Website RFP

This document outlines and analyzes the City of Austin RFP MSO0036 for a new Website. It includes much of the information from the document MSO00360500, but the content is reorganized and analysis and commentary are provided.

Introduction

The discussion about this RFP and the city Website can get confusing because the word, "requirements" refers both to the requirements of the current RFP and also to the requirements of the city Website. To avoid that confusion in this document, the word REQUIREMENTS will refer only to requirements of the current RFP. The word NEEDS refers to the requirements of the actual city Website that is to be built.

Needs (of the city Website) come in two forms: (1) functions made available to different types of users of the site whether from a browser, mobile device, or another program; and (2) descriptions of services or data that must be provided by some city back office system in order to support a need of the first type.

Examples of the first type of need, user-facing functionality, are:

- search for city jobs online
- apply for a city job online
- pay your parking ticket online
- register a business online
- get near real-time traffic info online

Examples of the second type of need, back-office services and data, are:

- provide a facility in the parking ticket payment system to support submission of payments by another program via data transfer or a Web service.
- provide near real-time data about traffic incidents from the system that has that information via data transfer or a Web service, so that it can be consumed by another program

Requirements of the Current RFP

The RFP document MSO00360500 describes the project work in different lists which are not so easily coordinated one with the other. This current document consolidates all this information into one list.

The current lists in the RFP are:

- Section 1.3.1: Consultant Services. This list describes 12 different services that the consulting project should provide.
- Section 1.4: Deliverables. The document says this is just an initial list that will be finalized later. The list includes 12 deliverables, which do not align with the 12 services listed in Section 1.3.1.
- Section 4.2: Table of Functional Requirements. This table lists 13 requirements of the project resulting from the RFP. They are numbered 4.01.001 through 4.01.013. There is a Microsoft Access database called the Vendor Response Access Database, which includes these requirements and is to be used by the vendor to provide their proposal responses. (I don't have Access, so have not looked at it.)
- Section 5.0 is titled, *Technical Requirements,* but is a description of the current Website, desktop, and network infrastructure, but does not really describe any requirements. There is no description of the city's back office systems.
- Section 6.0 is titled, *Implementation Requirements*, but talks about how to describe the vendor's methodology in the proposal.

The sections are inconsistent with each other. For example, the Consultant Services section makes no mention of branding, creative, templates, CSS files, and other elements of design and implementation. But the Deliverables and Functional Requirements sections talk about all these things as being part of the project.

Section 4 Functional Requirements

This section lists the 13 technical requirements of the project. Briefly, they are:

1. Gap analysis
2. User characteristics
3. Current state of the Austin Website
4. Information architecture
5. Branding, design, and creative
6. Web best practices for content, design, and development
7. Recommended development technologies, software, and tools
8. Implementation project plan with major milestones and timeline
9. Implementation costs
10. Description of how the site will support 508c disabilities act.
11. "Navigation integration" (which I think means wireframes) three levels deep
12. Multiple design templates for different page formats and content types
13. Recommend a Center of Excellence model. NOTE that all the other requirements are "Must Have", but this one is only "Expected"

I believe that requirements 5, 7, 8, 9, 12, and 13 are about design and implementation and do not address the needs of the Website: that is the user functionality and back-office data and services that must be provided in the delivered Website.

These six sections will not be discussed further except to make a few observations:

- the Governance plan and Center of Excellence are political, legal and managerial issues and should not be part of this project
- the legal fine print (terms of use, privacy, etc) should be not be a deliverable of this project. Rather, the city should decide on its guidelines in these areas, e.g. what are there planned terms of use?
- I would think the branding and creative, rather than being done in a vacuum, should be part of the city's overall marketing and identity plan. Colors, logos, artwork, style, fonts – these are things that should be consistent among all the city's outward facing interactions and should not be decided as part of this project.
- In Section 1.3.3, Buyer's Responsibilities, conspicuously absent from the list is the city's responsibility to provide access to people and documentation of current systems. This is probably one of the city's most important responsibilities for this project.

The rest of this document addresses each of the remaining seven technical requirements, and merges in with them the relevant consulting services and deliverables described elsewhere in the RFP. Each of the seven sections below includes the exact verbiage of the relevant portions of the RFP.

Commentary

First my personal commentary on these seven requirements. You may want to read the exact RFP verbiage below first, and come back to this section afterwards.

I am not a purist, but there is a difference between WHAT a Website (or any software application) does and HOW it does it. Sometimes the distinction is not as clear as in other instances, but it usually leads to trouble if you begin working on the HOW before you know most of the WHAT.

The WHAT was described earlier as needs: (1) user-facing functionality, and (2) data and services from back-office systems. Being able to pay parking tickets online is a WHAT. Having access to the parking ticket and payments database is a WHAT. The exact screens and keystrokes required to pay a ticket are HOW. Another HOW is the exact nature of the integration (Web service, FTP, etc) with the parking ticket and payments database.

NEEDS

The parts of this RFP which are concerned with the user-facing functionality needs of the city Website are requirements 1, 2, and 3. The way these three requirements are organized – as gap analysis, user characteristics, and current Website state – suggests a backwards approach.

A better approach is described in the next paragraphs. A better alignment of the RFP requirements and deliverables with this approach would, I believe, improve the vendor's and the city's chances for success.

First a complete inventory of the current Web site must be made. This not only includes the content presented to the user, but also the transactional functionality. For example, it appears that you can pay a parking ticket online today. This is a user-facing function. But the inventory must also include a discussion of the back-office systems that are used to support this function. Can those same systems be used in the new Website? If so, how are they integrated today? Is it just a simple link to a completely different Web app? Or a data exchange with a back-office payment system?

This inventory is created using a taxonomy of city Website functionality that must be developed. Then other city Websites – five are listed in the RFP – need to be inventoried. The gap analysis compares the Austin inventory with those of the other cities, both for items missing and functionality provided in a sub-standard way. The city should know what key functionality in these other Websites is not being recommended for its own new Website. It should also know where its current and planned functionality is deficient in comparison.

In parallel with creating and comparing these inventories, the user profiles/personas can be developed. These build on the user surveying the city has already done. The information available seems to relate only to browser access. The profiles need to be extended to include mobile users, social media users, and other programs (i.e. pure data exchange).

As the inventory and user profile activities proceed in parallel, the results can be merged, so that each need is correlated with one or more profiles that is must support. For example, you may decide that online payment of parking tickets is only available by browser with SSH, and not via mobile device or via API.

The deliverable the city should want from this effort is a complete needs inventory. I suspect there will be on the order of 1,000 needs documented. Each should indicate:

- whether the user functionality is currently supported by Austin
- if so, how is it supported (e.g. link to different Web site, data exchange with back-office system)
- what other cities support it and any key differences in user-facing functionality
- what is recommend for the new Website regarding this need:
    - end-user functionality
    - back-office system integration
    - profiles/personas that must be supported
- the absolute priority of supporting this need (because not all can be met)

I have some personal opinions about the taxonomy that could be used for this inventory which I will be happy to share.

Information Architecture

The other sections 4, 6, 10, and 11 described below are information architecture, best practices, disability support, and wireframes. They all deal with the same thing: laying out the high level site organization and flow. Some of this work can begin before the needs inventory is complete, but it is important to understand the types of needs and how they organize by user profile before thinking can begin on wireframing.

Too often people think of Information Architecture is limited to how the information lays out on Web pages. While this is important, the integration with back-office systems is just as critical to the overall architecture. With the increasing use of dynamic user interaction enabled by approaches like AJAX, Comet, and features coming in HTML 5; the Information Architecture may be less page oriented and more functionality based. Traditional screen-oriented wireframing is of limited value in this environment and must be augmented with other descriptions of navigation techniques.

Wireframes can be useful when done only in black and white and without any of the branding or creative. The important thing about them is information and flow (placement, keystrokes, mouse clicks, etc) rather than how it looks. It usually works out best to do the creative and branding work after the wireframes are complete. This is of course my opinion, and the RFP does not specify an order of the tasks, but it implies the opposite of what I have suggested.

The deliverable the city should want from this part of the project is a set of wireframes integrated with the needs inventory. It should be possible to use this information to answer two basic types of questions:

- "What things can the user do when here in the wireframe/process flow?"
- "Where and how is a specific need mapped into user activity?"

The remaining sections contain only verbiage from the RFP. I have not added or edited any of it.

4.01.001: Gap analysis

Functional Requirement: The vendor will provide a gap analysis of the current City of Austin Web site.

Deliverable: Gap Analysis Report – Fully documented report detailing the current status of the City Web environment. Report will include methodologies used for analysis and comparisons against known best practices for municipal Web sites.

Consulting Service: Gap analysis of current City of Austin Web site

4.01.002: User characteristics

Functional Requirement: The vendor will provide documentation that identifies and characterizes users of the City of Austin Web site

Deliverable: Fully documented report detailing research into customer groups that represent the City of Austin user community. Report will include defined customer profiles/personas that illustrate user

needs, expectations and experiences/processes specific to each group. It should be able to define what a "satisfied user experience" would consist of for each identified group

Consulting Service: Customer analysis – Customer profiles/personas defining user experience, needs and wants from the City Web site

4.01.003: Current state of the Austin Website

Functional Requirement: The vendor will provide documentation that outlines the current state of the City of Austin Web content.

Deliverable: Content Analysis Report – Fully documented report that details research into the state of the City's available Web content. Reports will analyze the "readiness" of existing Web content to be included in the proposed new information architecture plan. It will also identify key content areas that will need to be created or developed to support recommended portal structure.

Consulting Service: Content Analysis – Evaluate existing content, identify new content needs, and define supportable workflows to create and manage all content

4.01.004: Information architecture

Functional Requirement: The vendor will document recommended information architecture that reflects industry best practices as applied to the City of Austin Web site.

Deliverable: Information Architecture Report – Fully documented report that details recommended information architecture framework and portal structure. Report will include content flows, diagrams and wireframes that illustrate how new and existing content will be structured on the new site. It will also articulate the processes or structures that will be required to support recommended architecture.

Consulting Service: Information architecture – Recommend a scalable, flexible information architecture that best supports the overall site framework.

Some department Web sites maintain separate hosting and design standards that are different from the rest of the City site. The sites contain vital data that should be considered part of the City's information architecture. However, a determination has yet to be made if these sites will be required to participate in the new redesign requirements as outlined in the RFP. Provide separate costs for these two departments as noted in Appendix C.

4.01.006: Best practices for Web content, design, and development

Functional Requirement: The vendor will provide documentation of Web standards and policies that reflect industry best practices related to content, design and basic Web site development.

Deliverable: Social Media Analysis Report – Fully documented report that details common social media tools and how they can be used to better deliver government information and services online. Report should outline advantages and risks related to social technology and highlight safeguards and management tools to protect the City of Austin as well as the users of the site.

Web Standards and Policy Documents – Fully documented Web standards and policies that promote and uphold best practices for Web content, design and portal development on the City site. Documents will also include policies for terms of use, privacy and any related social networking disclaimer language.

Consulting Service: Social Media (Web 2.0) Strategy – Evaluate common social media tools and provide recommendations for the effective use in the delivery of government services online. These tools may include commonly used tools like Twitter, Facebook and YouTube as well as any other recommendations to enable social interaction with customers.

Web standards and policies – Develop standards and policies that promote and uphold best practices for Web content and portal development on the City site.

4.01.010: Description of how the site will support 508c disabilities act

Functional Requirement: The vendor will provide a cost analysis and total cost of ownership estimate.

Deliverable: All design elements must be delivered in compliance with the Americans with Disabilities Act (Section 508c). Design templates should be written using Cascading Style Sheets (CSS) and be tested for cross-browser compatibility

Consulting Service: none.

4.01.011: "Navigation integration" (wireframes) for three levels deep

Functional Requirement: The vendor will provide navigation integration that supports top-level (universal), second level (site) and third level (topical) navigation built-in. Solution should also support breadcrumbs and dynamic site mapping.

Deliverable: Information Architecture Report – Fully documented report that details recommended information architecture framework and portal structure. Report will include content flows, diagrams and wireframes that illustrate how new and existing content will be structured on the new site. It will also articulate the processes or structures that will be required to support recommended architecture

Consulting Service: Information architecture – Recommend a scalable, flexible information architecture that best supports the overall site framework.