Whatcom Smart Trips Website Upgrade REQUEST FOR PROPOSALS

INTRODUCTION

The Whatcom Council of Governments (WCOG) requests proposals to complete an upgrade of the Whatcom Smart Trips (WST) website to modernize and future-proof the site, as well as updating its appearance. The current website is accessible at www.whatcomsmarttrips.org.

Recognizing individuals and communities benefit when more daily trips are made by walking, bicycling, sharing rides and riding the bus, WCOG created Whatcom Smart Trips. This program helps community members make more of their trips using these sustainable transportation modes. The program's website has been used by nearly 19,000 community members to log trips. The program is administered and operated by WCOG with the support of the City of Bellingham, Whatcom County, Whatcom Transportation Authority, the Washington State Department of Transportation and the U.S. Department of Transportation.

Whatcom Smart Trips is a collection of programs and tools featuring:

- **An online trip diary** that helps community members identify opportunities for making trips by walking, bicycling, sharing rides and riding the bus
- **Smart Trips Incentives**, which include discount cards, gift certificates, cash prizes and recognition to motivate community members to try new forms of transportation
- **Emergency rides home** using limited, free taxi service so bus riders and other Smart Trips participants who experience an emergency or become ill at work can get home
- **Smart Trips employer partners** to provide support to businesses and organizations that want to promote sustainable transportation to their employees
- **Community outreach** provides education, assistance, and incentives by partnering with community groups that wish to promote walking, bicycling, sharing rides and riding the bus
- **School Smart Trips** program, which provides classroom activities for middle school students and bicycle skills courses for elementary school students
- **An ongoing public awareness campaign** that includes advertising and public presentations to make the community aware of the benefits of participation in the Smart Trips program

The original WST website was built in ASP prior to 2005 as a migration from a previous internal Access database. In 2012, the website was overhauled and completely rebuilt using Ruby On Rails but hasn't received significant technical investment since 2014. The WST website is used daily by program participants, employer partners, WCOG staff members and those interested in learning more about the program.

The WST website/webapp's primary purpose is to allow users to record their trips and track their progress towards prizes and incentives. The WST webapp also provides substantial management, admin, and reporting capabilities to WCOG staff.

The ultimate goal of the project is to take what has been successful for the past 10 years and invest in modernizations that will make it successful for the next 10 years, including both technical upgrades as well as design and user experience improvements.

A successful project execution will preserve current functionality, build on the proven foundation that exists, and provide a fresh user experience. New designs will be provided by Julie DeFoer of GoodEye Design, SmartTrips' established visual designer.

FEATURES OF CURRENT WST WEBSITE

For an exhaustive and complete scope of current functionality, respondents can request an app and codebase review meeting.

The current site has the following:

- Users/individual accounts
    - Users can sign up for accounts, edit their account, and reset their passwords
    - Users can log trips, view past trips, and see their progress towards milestones in their Trip Diaries
    - Users can view and export their personal trip statistics
- Employer accounts
    - Employers can view employees, remove employees
    - Employers can request a bus pass for an employee and view the status of that request
    - Employers can run a basic trip report for employees and export it to CSV
    - Employers can log trips for employees via simple REST API
- Reporting
    - WST contains 6 different reports
    - Reporting is centered on trips and users
- Mailing list
    - Admins can send monthly email reminders with custom text and subject
    - Reminders are delivered to all active, subscribed users
    - Users can be unsubscribed from monthly reminders
- Content management
    - Admins can create, edit, and delete pages
    - Pages are simple, with a title, body, and slug
- Bus pass portal

    - Pending bus pass requests can be viewed and authorized

- API

    - The WST webapp provides a simple REST API that is used by the SmartTrips iPhone and Android apps

TECHNICAL EVALUATION

\The WST webapp has not received substantial technical investment since 2014 so significant modernization and upgrades are needed to ensure future performance. However, a ground-up rewrite is neither necessary nor desirable in this situation. With some time and attention, this application can continue serving WCOG well for years to come.

The app is written in Ruby on Rails and uses Postgres as its primary data store. It's currently hosted on Heroku, although as it is now Dockerized, migration to another provider would be reasonably straightforward if indicated.

Because of the age of the application, there are numerous components that need attention:

- The current Ruby version is 2.0.0, which is beyond EOL.

- The current Rails version is 3.2.12, which is beyond EOL. This will involve quite a few Rails upgrade cycles, but the application is both relatively small and relatively idiomatic in how it uses Rails.
- The Docker image will need upgrades to support the updated dependencies and may need other developer quality of life improvements as well.
- The entire JavaScript frontend is out of date, using tools like jQuery, Foundation, and Sammy, and should very likely be scrapped and rewritten.
- The entire CSS frontend is out of date. It's based on Foundation and implemented using LESS as a preprocessor, which has fallen out of favor. The new design should almost certainly be implemented without consideration for this prior work.
- ActiveAdmin is at version 0.66 and will need to be upgraded, though there's no reason to think this application will pose any specific or unique challenges there.
- The background jobs still use Resque, which should be evaluated for replacement by something more modern.
- While there is a substantial test suite in place, it likely needs maintenance.

Overall, the current front-end will likely be more of a hindrance than a help for this next phase of WST's life, but the backend, though in need of modernization, is a strong foundation to build on.

SCOPE OF WORK

1. **Modernize the Ruby on Rails application**
   1.1. Upgrade to latest stable Ruby version, and make appropriate and necessary upgrades to Bundler, gems, and other dependencies
   1.2. Upgrade to latest stable Rails version, and make appropriate and necessary upgrades to Bundler, gems, and other dependencies
   1.3. Upgrade ActiveAdmin to latest stable version and ensure current admin functionality is preserved
   1.4. Update the Docker image as needed to support the above and ensure performance and stability upon deployment
   1.5. Replace the outdated Javascript frontend with a modern one (consultant's choice of framework)
   1.6. Replace LESS with SCSS or PostCSS
2. **Implement a brand-new design**
   2.1. Implement a completely new, responsive design provided by designer Julie DeFoer
     2.1.1. The design should be tested at common phone, tablet, laptop, and desktop sizes to ensure it looks good for community members on a wide range of devices
     2.1.2. The design should be tested in and made compatible with web browsers that represent 95% of current market share at launch time
     2.1.3. The consultant will provide WCOG and Julie DeFoer the opportunity to review the implemented design and request changes as needed
   2.2. Implement minor changes to the application to support the new design as needed. The consultant should inform WCOG if any of these require a change in scope.
   2.3. The implementation of the new design should meet the criteria of Section 508 of the Americans with Disabilities Act and prioritize accessibility for all members of our community
3. **Minor Improvements**
   3.1. Implement an anti-spam honeypot, captcha, or similarly address bots creating user accounts
   3.2. Implement ability to schedule monthly reminders to send automatically
   3.3. Implement an unsubscribe function for users
4. **Maintenance plan**
   4.1. Evaluate the long-term viability of Heroku as a hosting provider and propose an alternate provider and migration plan as needed, to be budgeted separately
   4.2. Propose an ongoing maintenance plan (to be budgeted separately) to provide application support, version upgrades, and patches for CVEs and other vulnerabilities

PROJECT DESCRIPTION

Based on the technical evaluation and scope of work as listed above, WCOG is seeking a consulting company to upgrade the existing WST website to a new version that will include modifications requested in this RFP. Because this project is funded by local grants, the budget for this project may not exceed **$40,000 (USD)** for the completion of the consultant portion of the work. A final agreement will be negotiated with the consultant following initial selection, as detailed further below.

This project may include additional phases to add new functionality pending available funding. The consultant company chosen to perform the update of the WST website may be considered for subsequent phases dependent upon satisfactory performance on prior work and upon negotiation of an agreement for the subsequent phase. WCOG is not obligated to use the same consultant company for all phases of the project.

TIMELINE

The project will begin as soon as a notice to proceed is delivered to the chosen consulting firm, estimated to be in October 2023. The project will span one calendar year and should be completed by the end of December 2024. A project timeline will be finalized as part of the contracting process.

SUBMITTAL INSTRUCTIONS

Proposals submitted in response to this RFP shall clearly describe:

- Professional credentials and relevant experience of the firm, along with any subcontractors and key personnel of all firms proposed for this project.
- Details of the approach for accomplishing the WST website upgrade, including a work plan, a management plan, and schedule.
- Proposed timeline for project, identifying start and projected completion dates.
- A description of your experience and ability to coordinate with an outside designer
- A description of your experience and technical capabilities working with Ruby on Rails
- The proposed contractor shall provide a reference list of at least three clients, including contact information, that have contracted with the proponent to do similar work to this project.

WCOG encourages disadvantaged, minority and women-owned firms to respond.

Whatcom Council of Governments reserves the right to amend terms of this RFP or to withdraw the RFP at any time, regardless of how much time and effort consultants have spent on their responses.

QUESTIONS

For administrative questions (such as timeline, submittal format), please contact Michelle Grandy at (360) 685-8388 or by email to michelle@wcog.org.

Non-administrative questions (such as clarifications about the scope of work, selection criteria, etc.) regarding this RFP may be submitted by email only to RFP@wcog.org. For the benefit of all proponents, questions and responses will be anonymously posted on the WCOG website at wcog.org/smarttripsrfp

All questions must be submitted by **September 25, 2023 by 5:00pm (Pacific Time)**.

SUBMITTAL DOCUMENTATION

All respondents shall submit a PDF copy of their proposals to: RFP@wcog.org.

Submittals are due to WCOG **on October 2, 2023 by 5:00pm (Pacific Time).**

SELECTION PROCESS

Proposals will be evaluated by the project advisory committee. In evaluating the proposals, the following criteria will be considered to determine up to three finalists to interview:

CRITERIA	POINTS
Experience and qualifications of the project team in completing similar projects	30
Understanding of the website and its features and functionality	25
Methodology and approach	20
Demonstrate ability to meet project schedule & deliverables	15
References (with emphasis on working with multiple government agency partners)	10
Total	*100*

The selection process will proceed as outlined below:

DATE	SELECTION PROCESS
Sept. 4, 2023	First advertisement of RFP
Sept. 11, 2023	Second advertisement of RFP
Sept. 18, 2023	Deadline for emailed questions
Oct. 2, 2023	Proposals due 5pm (PST) at WCOG office
Oct. 9, 2023	Selection for interview
Oct. 16, 2023	Interview finalists
Oct. 17, 2023	Notification of first choice selection
ASAP	Negotiate toward a contract with the first-choice proponent. If a final work plan and price cannot be agreed upon with the first choice proponent, WCOG will ask the second choice proponent to negotiate an agreement.

ALTERNATIVE FORMATS

Persons with disabilities may request this information be prepared and supplied in alternative forms by calling WCOG at (360) 676-6974.

ADA AND CIVIL RIGHTS

The Whatcom Council of Governments, in accordance with Title VI of the Civil Rights Act of 1964, 78 Stat. 252, 42 U.S.C. 2000d – 2000d-4 and Title 49, Code of Federal Regulations, Department of Transportation, subtitle A, Office of the Secretary, Part 21, nondiscrimination in federally assisted programs of the Department of Transportation issued pursuant to such Act, hereby notifies all bidders that it will affirmatively insure that in any contract entered into pursuant to this advertisement, disadvantaged business enterprises will be afforded full opportunity to submit bids in response to this invitation and will not be discriminated against on the grounds of race, color or national origin in consideration for an award.