

PROFESSIONAL SERVICES AGREEMENT
Northwoods

This **Professional Services Agreement**, which includes the Attachments referenced herein and attached hereto, (this “Agreement”) is effective **June 1, 2016** (the “Effective Date”), and is by and between **Milwaukee County**, a Wisconsin municipal body corporate, represented by the Department of Administrative Services (“County”), and the following contractor (“Contractor” or “Prime Contractor”):

Name: Northwoods
Address: 1572 E. Capitol Drive, Shorewood, WI 53211

This Agreement sets forth the terms and conditions under which Contractor agrees to provide County with professional services. Each individual professional services assignment, or statement of work, under this Agreement shall be set forth in a schedule in the form attached hereto as Exhibit A (“Schedule”). Each Schedule will be separately executed, and when so executed, is incorporated by reference and becomes a part of this Agreement. Terms and conditions of this Agreement shall supersede any contrary terms and conditions of any Schedule. Each Schedule, together with the terms and conditions of this Agreement, shall constitute and be construed as a separate agreement.

The Agreement consists of the following five documents listed below in the order of precedence that will be followed in resolving any inconsistencies between the terms of the Agreement and the terms of any Exhibits, Schedules, or Attachments thereto:

- a) This Professional Service Agreement;
- b) Any attached Schedules executed by the Parties;
- c) Milwaukee County Request for Proposal #98150016, attached as Exhibit B;
- d) Contractor’s Executed Statement of Work, attached as Exhibit E;
- e) Contractor’s RFP Proposal Response, attached as Exhibit D.

1. Definitions

1.1 The term “Project Manager” shall mean the individual assigned by each of the parties hereto to be the focal point for communications with the other party on a particular assignment.

1.2. “Deliverable(s)” is as defined in Section 5.1 of this Agreement, and includes those items listed in a Schedule as deliverables to be provided by Contractor to County.

1.3 The term “Vendor or Vendors” shall mean any individual or supplier that engages in business with Milwaukee County.

1.4 The term “State and Local Government” shall mean any state, county or municipal entity within the United States.

2. Proposals, Change Control, Acceptance.

2.1. **Scope of Work.** Contractor shall specifically perform all of the tasks and achieve the objectives set forth in its Proposal Response, dated December 22, 2015, which is attached hereto as Exhibit D and incorporated herein by reference, and the County Request for Proposal, dated December 2, 2015, which is attached hereto as Exhibit B and also incorporated herein by reference. If there is a variance between the Contractor’s Proposal and the County’s Request for Proposal, the latter shall be controlling, unless otherwise provided for in writing. A draft Statement of Work is attached as Exhibit C. County and Contractor will agree upon and finalize all items within the Statement of Work within 60 days of signed contract. Upon execution, the finalized Statement of Work will be attached to this Agreement as Exhibit E.

The Scope of Work will be defined by Schedule. The terms of a Schedule, together with any exhibits referenced herein or therein, shall define the scope of services for a particular assignment under this Agreement. Each Schedule shall specify the project objectives, County responsibilities (if any), Deliverables (if any), Contractor pre-existing material (if any), due dates, fees, the parties' respective Project Manager, and any other information relevant to the assignment and its successful completion. The Schedule, exhibits, detailed instructions, and task descriptions agreed to in writing by the parties' respective Project Managers collectively constitute the "Specifications" for the services to be performed by Contractor under any Schedule.

2.1.1 **E-Commerce Not Contemplated.** This Agreement shall extend only to the integration of third-party e-commerce tools and functions, and shall not be construed to contemplate the development, maintenance, or use of any County- or Contractor-owned e-commerce functions. Any change to this Provision must be made by a separate written Amendment, approved by Corporation Counsel and the County's Risk Manager, and executed by the Parties.

2.2. **Project Managers.** On each Schedule, the parties shall designate the name and telephone number of a Project Manager who shall be responsible for representing that party in all matters regarding the assignment governed by such Schedule. All transfer of Deliverables and communications regarding the scope of services under such Schedule shall be accomplished through the Project Managers. In addition, the Project Managers shall arrange and attend any progress review meetings, be responsible for ensuring that each party's responsibilities have been met on a timely basis and control all changes to the written Specifications. Either party may change the person designated to be its Project Manager for any Schedule at any time upon written notice to the other party's Project Manager.

2.3. **Change Control.** During the course of an assignment hereunder, County may desire a change in the scope of the Specifications. Requests for changes are to be made in writing and delivered to the Contractor Project Manager. Both Parties' Project Managers shall review the proposed change and either approve it for further investigation or reject it. The investigation shall determine the effect that the implementation of the change shall have on the Specifications and other terms and conditions of the Agreement. Upon completion of the review, any changes in Specifications or other terms shall be documented in writing and signed by the Parties or Parties' respective designees. If, despite diligent and good faith negotiations, the Parties fail to agree on the character or effect of a change to the Specifications, then at County's option (a) Contractor will continue performing the services without changes to the Specifications, or (b) Contractor, immediately upon written notice from County, will cease performing the services and Contractor will receive payment for services performed up to the time of such notice from County in accordance with the terms of this Agreement and the affected Schedule.

2.4. **Acceptance.** Notwithstanding anything to the contrary, all of Contractor's services and Deliverables will be subject to review and written acceptance by the County based on the requirements of this Agreement, as well as the applicable Schedule and Specifications, and no payment will be due before such acceptance, which will not be unreasonably withheld. Contractor will correct all deficiencies found during such review at no charge to County. Any claims that County may have under this Agreement will survive such review, acceptance and payment.

3. Staffing

3.1. **Subcontracting and Contractor's Employees.** Contractor shall not assign, delegate, or subcontract any portion of its rights, duties or obligations under this Agreement, including a Schedule (unless otherwise expressly agreed to in the applicable Schedule), without the express prior written consent of County. Notwithstanding Contractor's retention of such third parties and said County consent (if provided by County), Contractor shall remain responsible for the performance of services and compliance with all terms of this Agreement and the applicable Schedule. Contractor is responsible for ensuring that it has a written and enforceable agreement in place with each of its subcontractors that will enable Contractor to perform its obligations under this Agreement and every Schedule hereto. Personnel used or supplied by Contractor in the performance of any services governed by a Schedule shall be employees of Contractor, and under no

circumstances are such personnel to be considered employees of County. Contractor shall have the sole responsibility for the conduct of its personnel, and for payment of its personnel's entire compensation, including salary, withholding of income and social security taxes, workers' compensation, employee and disability benefits and the like. Contractor shall be responsible for all employer obligations toward all of its personnel under all applicable laws and all of County's policies. Contractor will defend, indemnify and hold County harmless against any claims that in any way: (i) assert that any of Contractor's personnel are employees or joint employees of County; (ii) relate to the conduct of Contractor's personnel; and/or (iii) pertains to a breach of this Agreement, including, without limitation, Section 6.

3.2 Staffing – Qualifications and Replacement. Contractor represents it possesses the necessary skill, expertise, and capability to perform the services required by this Contract. County represents that its employees will make available any needed information on systems, policies, procedures, and needs unique to County government. County shall have the right to review and approve the qualifications of any personnel Contractor assigns to perform services governed by a Schedule. County may require Contractor to remove and/or replace any such personnel upon notice to Contractor. Without limitation to the foregoing and when Contractor's personnel are on County's premises, Contractor will immediately remove and replace any Contractor personnel if County determines that such personnel violated or may have violated County's policies or work rules. Upon County's prior written consent, Contractor will also replace personnel when necessary and appropriate in County's opinion. Contractor agrees to maintain a consistently high skill level among all replacement personnel whether Contractor or County instigated the replacement. If the successor to said resources cannot be mutually agreed upon, the County shall have the right to terminate this Agreement upon thirty (30) days' written notice.

3.3. Office Space and Support to be Provided by County. The County hereby agrees to make available, without charge to Contractor, office space, office furniture, and office equipment needed by Contractor for the performance of its services agreed to within this Contract.

4. Fees, Invoices, Payment

4.1 Fees/Payment. Contractor's fee for services and Deliverables rendered are as set forth in the applicable Schedule. Invoices shall be submitted to County's Project Manager by no later than ninety (90) days after completion of the services set forth in the invoice (unless otherwise specified in the applicable Schedule). Contractor is responsible for all charges, costs and fees incurred as a result of performing its obligations, rendering its services, and providing Deliverables hereunder. All invoices submitted by Contractor shall set forth the following information: (i) the Effective Date of this Agreement and the number of the Schedule being billed; (ii) County's purchase order number, if applicable, (iii) Contractor's Project Manager's name; (iv) name of employee; (v) a description of general Deliverables completed; and (vi) the amount being billed. County shall make payment within thirty (30) days after receipt of an accurate invoice from Contractor and County's acceptance of the corresponding services and Deliverables that comply with the terms of this Agreement. State Prompt Pay Law, Section 66.285, does not apply to this Contract. As a matter of practice, the County attempts to pay all invoices in 30 days. If no disputes arise, and the invoice has not been paid 60 days after it was received, and approved, by the County, the Contractor may file a claim for the unpaid amount plus 4% on the amount not paid after the 60th day. Upon reasonable request from County to Contractor, County, or an authorized agent, shall have the right to audit, at the Contractor's offices and during Contractor's normal business hours, any and all charges in connection with services performed and/or Deliverables furnished under this Agreement. Contractor agrees to immediately pay any overcharges found, and in the event that said overcharges exceed three percent (3%) of the amounts charged on one or more Contractor submitted invoices, Contractor agrees to immediately reimburse County for its incurred expenses associated with conducting said audit.

4.2. Fees, Taxes and Licenses. Milwaukee County is exempt from Federal Excise Taxes and Wisconsin State Sales Taxes. Any billing submitted by Contractor should be without such taxes. However, Contractor shall be responsible for all federal, state and local permits, licenses, and fees, together with all governmental filing related thereto, which arise out of the performance of Contractor hereunder, or which arise as a result of compensation paid hereunder.

4.3. Billing Disputes. Billing disputes shall not be cause for non-performance by Contractor under this Agreement.

5. Ownership, Confidentiality and Reports.

5.1. As used in this Agreement, the term "Deliverables" means all items in tangible and intangible form, including inventions, discoveries, works of authorship, programs, derivative works, ideas, techniques, methods, processes, documentation and materials, that Contractor (including its employees, agents, or subcontractors) creates, prepares or delivers to County, or otherwise produces, conceives, makes, proposes or develops, as a result of this Agreement and one or more Schedules. No reports or documents produced in whole or in part under this Agreement shall be the subject of an application for copyright by or on behalf of the Contractor.

5.2. Contractor on its behalf and on behalf of its employees, agents and subcontractors, grants, releases and assigns to County all right, title and interest, including ownership of all intellectual property rights therein including trade secrets, copyrights, moral rights, database rights and patents, in Deliverables. All Deliverables created by Contractor, its employees, agents or subcontractors will be "works made for hire" and the sole and exclusive property of County. Therefore, any reports, information and data, given to or prepared or assembled by Contractor under this Agreement shall not be made available to any individual or organization by Contractor without the prior written approval of County. To the extent that any pre-existing materials are contained in the Deliverables, said pre-existing materials must be described as such in the applicable Schedule and Contractor hereby grants County an irrevocable, worldwide, nonexclusive, paid-up, royalty-free right and license to use, execute, reproduce, perform, display, distribute, and prepare derivative works of such pre-existing material and derivative works, and to make, have made, use, sell, offer for sale and import products and processes utilizing such pre-existing materials, as well as to authorize others to do any or all of the above, but in any case limited to the extent needed by County to exploit the Deliverables. Upon County's request and at Contractor's expense, Contractor will provide County with such assistance as County may require, including whatever documents, information or materials are in Contractor's possession or available to Contractor, in order to enable County to protect its ownership rights, including copyrights and patents, in any Deliverables.

5.3. **Confidentiality.** Contractor agrees that the existence of this Agreement, including the nature of the services and the Deliverables provided under all Schedules issued hereunder, as well as all information and material disclosed by County to Contractor, and all information and material that Contractor develops under this Agreement in the context of performing any services and/or Deliverables hereunder, constitutes "County Confidential Information." Contractor will not disclose County Confidential Information to any third party person or entity, except to the extent required by a court or government agency order or rule (provided that Contractor first gives County written notice of such order or rule to enable County to have the opportunity to quash or limit the scope of said order or rule). Contractor may disclose County Confidential Information only to those of its employees, agents and subcontractors (only if previously approved by County in writing and only if they have previously signed a confidentiality agreement that is consistent with the terms of this Section 5.3), who possess a legitimate need to know for purposes of fulfilling obligations to County under this Agreement and the applicable Schedule(s), and may use County Confidential Information only for such purposes. County Confidential Information does not include information that is or becomes publicly available without restriction to Contractor or any other person through no wrongful act. All County Confidential Information is and remains the property of County, and upon written request Contractor will promptly return all Confidential Information, along with all copies and portions thereof, to County. Without waiving any other rights that County may have and notwithstanding anything to the contrary herein, County may immediately terminate with cause (with no right to cure) this Agreement upon written notice to

Contractor in the event that Contractor uses or discloses County Confidential Information other than as expressly permitted in this Section 5.3.

5.4 **Reports.** Contractor shall provide written progress reports or oral presentations to County as directed by the County Chief Information Officer or designee. At the termination of this Agreement, Contractor shall provide one (1) electronic copy of a final report for each of the projects completed.

6. Representations and Warranties

6.1. Contractor represents and warrants that County's use or possession of any Deliverables (including any pre-existing materials provided by Contractor) will not constitute an infringement or violation of any patent, copyright, trade secret or other proprietary rights of any third party

6.2. Contractor warrants that it shall use all commercially reasonable efforts to perform the services as defined and described in the applicable Schedule and in accordance with the terms of this Agreement.

6.3. Contractor warrants that the services and Deliverables provided under this Agreement shall be performed in a good and workmanlike manner in accordance with generally established professional standards and practices for such services and in accordance with the best practices in Contractor's industry, and that such services and Deliverables will comply with all applicable laws, regulations, codes, and ordinances.

6.4. Contractor represents and warrants that it has or will obtain appropriate agreements with its employees and others whose services it may require, sufficient to enable full compliance with all the provisions of this Agreement, including, without limitation, Section 5 above. In addition, Contractor warrants that it will cause its employees, agents and subcontractors to sign any documentation required for access to County Confidential Information and other technology.

6.5. In the event of any failure by Contractor to comply with any of the provisions contained in Sections 6.1 through 6.4 and/or Section 7, in addition to County exercising any of its other rights and remedies under this Agreement or otherwise at law or in equity, and at no additional expense to County, County may require, as applicable, that Contractor promptly:

(i) procure for County the right to continue using the Deliverables; or

(ii) replace infringing items or components of the Deliverables with a non-infringing equivalent or a component or part thereof of equal performance and quality; or

(iii) modify the infringing items or components of the Deliverables so that they become non-infringing; or

(iv) perform all tasks and services necessary to timely provide Deliverables that satisfy the terms of this Agreement and the applicable Schedule(s), and that do not incorporate proprietary material, or otherwise infringe the rights, of any third party.

6.6. Contractor warrants that it shall not use any trademarks or trade names of County any time during or after the term of this Agreement. Notwithstanding the immediately preceding sentence, in the event Contractor wishes to identify County as one of its customers, Contractor may do so to the extent specifically pre-approved in writing by County.

6.7. Contractor warrants that it is in full compliance with the Immigration Reform and Control Act of 1986, as amended, and that it will only provide County with personnel whose employment eligibility has been verified; that it is in full compliance with all applicable laws relating to equal employment opportunity; and that it is in full compliance with all applicable federal, state, and local laws, statutes, rules and regulations.

7. Indemnities.

The parties agree to the fullest extent permitted by law, to indemnify, defend and hold harmless, the other party and its agents, officers and employees, from and against all loss or expenses including cost and attorney's fees by reason of liability for damages including suits at law or in equity limited to five times the total Agreement amount, caused by any wrongful, intentional, or negligent act or omission of the indemnifying party, or its (their) agent(s) which may arise out of or are connected with the activities covered by this Agreement. The County's liability shall be limited by Wis. Stat. Section 893.80 for general liability.

The foregoing obligations are conditioned upon: (a) prompt written notice by the indemnified party to the indemnifying party of any claim, action or demand for which indemnity is claimed, provided however that the failure to give such notice shall not relieve the indemnifying party of its obligations hereunder except to the extent that such indemnifying party is materially prejudiced by such failure; (b) complete control of the defense and settlement thereof by the indemnifying party, provided that no settlement of an indemnified claim shall be made without the written consent of the indemnified party; and (c) reasonable cooperation by the indemnified party in the defense as the indemnifying party may request. The indemnified party shall have the right to participate in the defense against the indemnified claims with counsel of its choice at its own expense.

8. Term and Termination.

8.1 The term of this Agreement shall commence on the Effective Date, and shall continue in full force and effect until all Deliverables outlined in the Statement of Work are provided, unless terminated earlier in accordance with this Section 8, or as otherwise provided in the applicable Schedule. County may elect to extend the term of this Agreement upon written notice to Contractor through applicable Schedules.

8.2. This Agreement or any Schedule(s) may be terminated by as follows:

(a) without cause, by thirty (30) calendar days prior written notice by U.S.P.S. Certified mail to Contractor by County.

(b) by thirty (30) business days prior written notice by U.S.P.S. Certified mail to Contractor by County, in the event the Contractor breaches or is in default of any obligations hereunder, which default has not been cured within the second day receipt of notice of such default; provided, however, that upon a second breach of the same obligation by the Contractor, the County may terminate this Agreement immediately upon notice to the Contractor; or

(c) effective immediately, in the event the other party becomes insolvent or is the subject of an "order for relief" as that term is defined in the U. S. Bankruptcy Code, or in the event of an assignment or other arrangements for the benefit of the other party's creditors.

(d) If funds are not appropriated for payment of this Agreement, the County may terminate the construct upon thirty (30) days' written notice without any early termination penalties, charges, fees or costs of any kind to the County.

8.3. County may terminate any portion(s) of a Schedule without cause upon thirty (30) calendar days' prior written notice to Contractor.

8.4. County shall retain any and all fully vested rights that exist on the effective date of termination. In the event that County terminates this Agreement or a Schedule in accordance with Section 8.2(a) or 8.3, County's liability and Contractor's exclusive remedy will be limited to County paying Contractor for services and Deliverables completed in accordance with the terms of this Agreement and the applicable Schedule; provided, however, that such payment will not exceed the unpaid amounts due under the applicable Schedule(s).

8.5. Upon termination of this Agreement, (i) Contractor will immediately cease all use of the County Confidential Information and shall deliver to County all items containing, embodying, relating to or comprising County Confidential Information, as well as any other documents, assets or things, belonging to County that constitute Deliverables regardless of completion (Contractor shall not take or retain copies of any of the foregoing); (ii) any payments that may have been made by County to Contractor in advance, which are in excess of amounts due Contractor in accordance with this Section 8 (if any), will be refunded to County within thirty (30) days following the effective date of termination; (iii) any property, including hardware or software, that was provided by County to Contractor without obligation of payment by Contractor will be immediately returned to the County Project Manager in the same condition that such property was received (less normal wear and tear) by no later than the effective date of such termination; and (iv) this Section 8, as well as Sections 2.4, 3.1, 4, 5, 6, 7, 8, 10, 11, and 12 will survive the termination of this Agreement and/or a Schedule.

8.6. **Cooperation Upon Termination.** Contractor must cooperate with the Milwaukee County in the event of termination so as to ensure that Milwaukee County can maintain continuity of service delivery. Such cooperation will include the provision to Milwaukee County of the names, addresses and telephone numbers of personnel, independent Contractors and subcontractors as well as salaries, organizational charts, certifications, lists of all subcontractors with names, addresses and telephone numbers with M/W/DBE designation as appropriate, and any other necessary information to ensure that Milwaukee County can maintain continuity of service delivery addressed in this Agreement. Contractor must provide said information prior to the effective date of the termination or agreement end.

9. Insurance

9.1. Contractor shall purchase and maintain policies of insurance and proof of financial responsibility to cover costs as may arise from claims of tort, statutes, and benefits under Worker’s Compensation laws, as respects damage to persons or property and third Parties in such coverages and amounts as required and approved by the County Director of Risk Management and Insurance.

Prior to commencing any Services pursuant to this Agreement, Contractor shall furnish to the Director of Risk Management and Insurance certificates of, and shall continue to maintain during the term hereof, insurance satisfactory to County, evidencing the following coverage:

The Contractor shall provide evidence of the following coverages and minimum amounts:

<u>Type of Coverage</u>	<u>Minimum Limits</u>
Workers’ Compensation	Statutory Waiver of Subrogation
Employer’s Liability & Disease	\$100,000/\$500,000/\$100,000
General Liability	
Bodily Injury & Property Damage	\$1,000,000 Per Occurrence
To include Personal Injury, Fire, Products and Completed Operations Contractual Liability	\$2,000,000 General Aggregate
Cyber Liability	\$1,000,000 Per Occurrence \$1,000,000 Aggregate

Milwaukee County, as its interests may appear, shall be named as an additional insured for General liability as respects the Services provided in this agreement. Disclosure must be made of any non-standard or restrictive additional insured endorsement, and any use of non-standard or restrictive additional insured

endorsement will not be acceptable. A thirty (30) day written notice of cancellation, non-renewal, or material change shall be afforded to the County.

The insurance specified above shall be placed with an AA+ rated carrier per Best's Rating Guide approved to do business in the State of Wisconsin. Any deviations or waiver of required coverages or minimums shall be submitted in writing and approved by the County Director of Risk Management and Insurance as a condition of this agreement. Waivers may be granted when surplus lines and specialty carriers are used.

A certificate of Insurance shall be submitted for review to the County for each successive period of coverage for the duration of this agreement.

9.1.1 Compliance with Governmental Requirements. Contractor shall evidence satisfactory compliance for Unemployment Compensation and Social Security reporting as required by Federal and State Laws.

Deviations and waivers may be requested in writing based on market conditions to the County Director of Risk Management and Insurance. Approval shall be given in writing of any acceptable deviation or waiver to the Contractor prior to the Contractor effecting any change in conditions as contained in this section. Waivers shall not be unduly withheld nor denied without consultation with the Contractor.

It is understood that the Contractor will obtain information on the liability coverages of all subcontractors in the same form as specified above.

10. Compliance With County's Policies

10.1. Safety and Security Policies. Contractor agrees to use all commercially reasonable efforts to cause any of its employees who provide services under this Agreement on County's premises to comply with County's safety and security policies that County communicates to the extent that such policies are applicable to the site where Contractor's employees are providing services. Notwithstanding the above, such standard safety and security policies shall not include policies related to drug testing and background checks.

10.2. Drug Use Policies. Unless conflicting to any laws where the services are being provided, which in such case this section shall not be enforceable, Contractor will advise any Contractor employee who provides services under this Agreement on County's premises of County's right to require an initial drug screen prior to the commencement of the assignment and, further to require a drug screen at any time during the assignment either (i) if County believes in good faith that the Contractor employee is under the influence of an illegal substance, or (ii) as a consequence of an accident caused by or involving the Contractor employee on County's premises during the performance of this Agreement and likely to have been related to Contractor's employee's use of an illegal substance. Drug screening (unless provided by the County) shall be performed by Contractor at Contractor's expense and Contractor will address any positive results and handle accordingly. Contractor's employee will not be permitted to perform the services if a positive result of said drug screen is determined.

10.3. Background Checking. Unless conflicting to any laws where the services are being provided, this Section 10.3 is enforceable. Prior to deploying any employees on a recurring basis (whether every day, once a week, once a month or fiscal quarter) at any County location, facility, or work site, Contractor shall perform a background screen to assure that no Contractor employee is included on a Government List (as defined herein). Government List is defined as including those lists that:

(A) are published by the United States Government, including the (i) Department of Safety, Arms Export Control Debarment List; (ii) Department of State, Proliferation List; (iii) Department of Commerce Denied Parties List; (iv) Department of Commerce, Entities List; (v) Department of Treasury, Specially Designated National List. For Contractor employees, Contractor shall also

assure the Contractor's employee status to rightfully work in the United States through compliance with the Immigration and Naturalization Service's I-9 process ("I-9 Check"); and

Upon request by County, the background screen shall include verification of the Contractor employee's highest level of education. Contractor shall maintain as records all such background checks for three (3) years after the termination or expiration (whichever is applicable) of this Agreement.

10.4. Affirmative Action. The Contractor assures that it will undertake an affirmative action program as required by 14 CFR Part 152, Subpart E, to insure that no person shall on the grounds of race, creed, color, national origin, or sex be excluded from participating in any employment activities covered in 14 CFR Part 152, Subpart E. The Contractor assures that no person shall be excluded on these grounds from participating in or receiving the services or benefits of any program or activity covered by this subpart. The Contractor assures that it will require that its covered suborganizations provide assurances to the Contractor that they similarly will undertake affirmative action programs and that they will require assurances from their suborganizations, as required by 14 CFR Part 152, Subpart E, to the same effect.

10.5. Disadvantaged Business Enterprise. The Contractor shall comply with Milwaukee County Ordinance Chapter 42 and CFR 49 part 23, which has an overall goal of seventeen percent (17%) participation of certified disadvantaged, minority and/or women business enterprise (DBE) on professional service contracts. In accordance with this, the Contractor shall ensure that DBE's have the maximum opportunity to participate in this project. The specific goal for this project is seventeen percent (17%).

10.6. Non-Discrimination, Equal Employment Opportunity and Affirmative Action Programs. In the performance of work under this Contract, Contractor shall not discriminate against any employee or applicant for employment because of race, color, national origin or ancestry, age, sex, sexual orientation, gender identity and gender expression, disability, marital status, family status, lawful source of income, or status as a victim of domestic abuse, sexual assault or stalking, which shall include, but not be limited to, the following:

Employment, upgrading, demotion or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeships. Contractor will post in conspicuous places, available for employees and applicants for employment, notices setting forth the provisions of the non-discriminatory clause.

Contractor agrees to strive to implement the principles of equal employment opportunity through an effective Affirmative Action program, and has so indicated on the Equal Employment Opportunity Certificate attached hereto as and made a part of this Contract. The program shall have as its objective to increase the utilization of women, minorities and handicapped persons, and other protected groups, at all levels of employment, in all divisions of Contractor's work force, where these groups may have been previously under-utilized and under-represented. Contractor also agrees that in the event of any dispute as to compliance with the aforesaid requirements, it shall be its responsibility to show that it has met all such requirements.

When a violation of the non-discrimination, equal opportunity or Affirmative Action provisions of this section has been determined by County, Contractor shall immediately be informed of the violation and directed to take all action necessary to halt the violation, as well as such action as may be necessary to correct, if possible, any injustice to any person adversely affected by the violation, and immediately take steps to prevent further violations.

If, after notice of a violation to Contractor, further violations of the section are committed during the term of the Contract, County may terminate the Contract without liability for the uncompleted portion or any materials or services purchased or paid for by the Contractor for use in completing the Contract, or it may

permit Contractor to complete the Contract, but, in either event, Contractor shall be ineligible to bid on any future contracts let by County.

10.7. **Prohibited Practices.**

(A) Contractor during the period of this Agreement shall not hire, retain or utilize for compensation any member, officer, or employee of County or any person who, to the knowledge of Contractor, has a conflict of interest.

(B) Contractor hereby attests that it is familiar with Milwaukee County's Code of Ethics which states, in part, "No person may offer to give to any County officer or employee or his immediate family, and no County officer or employee or his immediate family, may solicit or receive anything of value pursuant to an understanding that such officer's or employee's vote, official actions or judgment would be influenced thereby."

11. **County Resources, County Personal Data.**

11.1 Access to County Resources. County, in its sole discretion, may permit Contractor to have on-line access to County Resources in order to facilitate Contractor's ability to perform its obligations to County under this Agreement. If such access is granted, Contractor will promptly give County in writing the names of Contractor's employees designated as Authorized Personnel, and County will provide a separate user identification code for each person ("**Password**"). Only Authorized Personnel may access and use County Resources. Authorized Personnel will access and use County Resources solely for the purpose of fulfilling Contractor's obligations to County under this Agreement ("**Permitted Use**"). Passwords and County Resources are provided on an "**AS-IS**" basis and constitute County's Confidential Information. Contractor is responsible for all costs and expenses it incurs in accessing County Resources, including the cost of any hardware, telecommunications Services, network connections, and software not furnished by County.

11.2 Termination of Access. County, in its sole discretion, may terminate with or without cause Contractor's and/or any Authorized Personnel's access to County Resources at any time.

11.3 Contractor Expectation of Privacy. Contractor agrees that Contractor (including the Authorized Personnel) have no expectation of privacy when using or accessing County Resources, and that County may access, review, copy or delete any messages and files for any purpose and disclose them to any Party that County deems appropriate.

11.4 Compliance with County Instructions. Contractor, including Authorized Personnel, will:

- a. comply with all instructions County provides concerning access to County Resources;
- b. not access or attempt to access those County Resources that County has not authorized in writing Contractor to access;
- c. not modify, copy, store, transfer, install, delete or obtain programs or data from County Resources, unless County has expressly authorized Contractor to do so in advance and in writing;
- d. not cause County to incur fees or service charges; and
- e. not change the configuration or topology of County Resources.

11.5 Contractor's Obligation to Report Misuse. Contractor will immediately notify County verbally and in writing should Contractor become aware of any prohibited use or unauthorized access involving County Resources. Contractor, including Authorized Personnel, will immediately cease accessing all County Resources upon the earliest to occur: (a) when no longer required to perform work under this Agreement; (b) when notified by County; or (c) when this Agreement terminates or expires. Contractor will promptly notify County if it becomes aware of any unauthorized access to or use of County Resources, and will instruct Authorized Personnel to do the same.

11.6 Electronic Documents Considered Writing. Any document properly transmitted by computer access will be considered a “writing” delivered in connection with this Agreement. Electronic documents will be considered signed by a Party if they contain an agreed upon electronic identification symbol or code as required by law. Electronic documents will be deemed received by a Party when accessible by the recipient on the computer system.

11.7 Compliance with Personal Data Protection Policy. Contractor shall comply with the Personal Data Protection Policy, attached as Exhibit F.

12. General Conditions and Provisions

12.1. Notices. All notices required under this Agreement shall be in writing and will be sent by a nationally recognized overnight courier. Notices will be deemed given on the date delivered to the recipient (it being agreed that the sender will retain proof of delivery). Notices will be sent to as follows:

To County:

Laurie Panella
Chief Information Officer
Information Management Services Division
Milwaukee County
633 W. Wisconsin Ave, Suite 1100
Milwaukee, WI 53203

To Contractor:

Northwoods
ATTN: Tom Pappas
1572 E. Capitol Drive
Shorewood, WI 53211

Either party may designate a new address for purposes of this Agreement, by written notice to the other party.

12.2. Assignment. Contractor acknowledges that this Agreement is in the nature of a personal services contract. Accordingly, Contractor shall not sell, assign, delegate, or otherwise transfer any of its rights or obligations hereunder without the prior written consent of County. Subject to these restrictions, this Agreement shall be binding upon and inure to the benefit of the parties, their successors and assigns.

12.3. Force Majeure.

12.3.1 Except as otherwise provided in Section 12.3.2 below, any delay or failure of a party hereto to perform its obligations hereunder will be excused if and to the extent that it was caused by an event or occurrence beyond such party’s reasonable control and without its fault or negligence (“Force Majeure”). Force Majeure includes, but is not limited to, acts of God, actions by any government authority (whether valid or invalid), fires, floods, windstorms, explosions, riots, natural disasters, wars, sabotage, acts of terrorism, or court injunction or order. A party claiming Force Majeure must provide the other party with written notice of such delay (including the anticipated duration of the delay) within ten (10) days of the occurrence of Force Majeure. During the period of such delay or failure to perform by Contractor, County may acquire substitute or replacement services from one or more alternative sources, and in such event, there may be a proportionate reduction of services required from Contractor and County will not be liable in any way for such reductions. If the delay lasts more than thirty (30) days, or if Contractor does not provide adequate assurances that the delay will cease within thirty (30) days, County may terminate this Agreement and/or any or all incomplete Schedules, upon written notice and any funds pre-paid by County will be refunded by Contractor within ten (10) business days of said termination.

12.3.2. Notwithstanding anything in this Agreement to the contrary, no delay or failure of Contractor to perform its obligations hereunder will be excused if it is caused by: (i) labor problems of Contractor, its subcontractors, and/or its suppliers such as, by way of example and not by way of

limitation, lockouts, strikes, and slowdowns, or (ii) the inability of Contractor, its subcontractors, and/or suppliers to obtain power, materials, labor, equipment, or transportation. Items (i) and (ii) above as stated in this Section 12.3.2 do not constitute Force Majeure for purposes of this Agreement.

12.4. Modification and Waiver. This Agreement may not be modified and none of its terms may be waived, except in writing and signed by authorized representatives of both parties. To the extent that any term in any document, other than a writing signed by both parties that expressly purports to amend this Agreement, is contrary to, or conflicts with this Agreement, the terms of this Agreement shall control. A waiver by a party of any default shall not be deemed a waiver of a prior or subsequent default of the same or other provisions of this Agreement. The failure of a party to enforce, or the delay by a party in enforcing, any of its rights shall not be deemed a continuing waiver or a modification of this Agreement.

12.5. IN NO EVENT WILL COUNTY BE LIABLE TO CONTRACTOR FOR ANY SPECIAL, EXEMPLARY, INCIDENTAL, INDIRECT, PUNITIVE, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, LOST PROFITS, REVENUE, AND BUSINESS), WHETHER BASED ON BREACH OF CONTRACT, TORT (INCLUDING NEGLIGENCE), STATUTE, EQUITY, PRODUCT LIABILITY, FUNDAMENTAL BREACH, OR OTHERWISE ARISING OUT OR RELATED TO THIS AGREEMENT, REGARDLESS OF WHETHER OR NOT COUNTY HAS BEEN ADVISED OF THE POSSIBILITY OF ANY SUCH DAMAGES.

12.6 Severability. If any part of this Agreement is declared invalid or unenforceable by a court of competent jurisdiction, it shall not affect the validity or enforceability of the remainder of this Agreement, unless the Agreement so construed fails to meet the essential business purposes of the parties as manifested herein.

12.7 Relationship. It is expressly agreed that the parties intend by this Agreement to establish between themselves the relationship of independent contractors. It is further agreed that a party has no authority to create or assume in the other party's name or on behalf of the other party, any obligation, express or implied, or to act or purport to act as agent or representative on behalf of the other party for any purpose whatsoever. Neither County nor Contractor is the employer, employee, agent, partner, or co-venturer of or with the other, each being independent.

12.8 Advertising/Publications. Contractor (including its agents, third party contractors, and suppliers) shall not use County's name, photographs, logos, trademarks, or other identifying characteristics in any marketing, public relations or similar publications (such as, but not limited to, Contractor's marketing brochures or press releases) without County's prior written approval.

12.9. Governing Law. Contractor agrees to comply with all applicable Federal, State, County, and Local statutes, laws, rules, regulations, ordinances, and all policies, procedures, standards and regulations of accreditation agencies or bodies. Contractor agrees to hold County harmless from any loss, damage, or liability resulting from a violation on the part of Contractor of such laws, rules, regulations, policies, procedures, standards or ordinances. This Agreement shall be governed by and interpreted, construed, and enforced in accordance with the internal laws of the State of Wisconsin, without regard to conflict of law provisions thereof. Venue should reside in Milwaukee County and the Eastern District of Wisconsin.

12.10 Audit and Inspection of Records. For a period up to three years after completion of the Agreement, Contractor shall permit the authorized representatives of County, after reasonable notice, to inspect and audit all data and records of Contractor related to this Agreement. Contractor must obtain prior written County approval for all subcontractors and/or associates to be used in performing any of the obligations described in this Agreement. There must be a written contractual agreement between the Prime Contractor and its County-approved subcontractors and/or associates, which binds the subcontractors to the same audit Agreement terms and conditions as the Prime Contractor.

12.11 Guaranteed Most Favorable Terms. Contractor certifies and agrees that all of the prices, terms, warranties and benefits granted by Contractor herein are comparable to or better than those offered by

Contractor to other State and Local Government customers contracting under the same material terms and conditions. As used herein, material terms and conditions include those terms related to the execution of this Agreement for services procured under this Agreement and any related pricing. Should Contractor announce a general price reduction or make available to other State or Local Government customers more favorable terms or conditions with respect to any of the services contained in the Schedule, such prices, terms and conditions will be made available to County upon the date the general price reduction or more favorable terms and conditions become effective.

12.12. **Technology Policy.** Contractor hereby attests that it has been furnished with a copy of Milwaukee County's Use of Technologies Policy (attached as Exhibit E) which prohibits the inappropriate use of County-provided technology resources. Contractor acknowledges that it has familiarized itself with Milwaukee County's Use of Technologies Policy and that it specifically agrees that it will make its employees and agents aware of the provisions of said policy. County may, at its discretion, require specific users of County-provided technology, to sign a "User Statement" acknowledging receipt of a copy and awareness of Milwaukee County's Use of Technologies Policy.

12.13 **Entire Agreement.** This Agreement (including all Schedules hereto) is intended by the parties as a final and complete expression of their agreement on the subject hereof, and supersedes any and all prior and contemporaneous agreements and understandings. No other agreements, oral or otherwise, on the subject matter hereof shall be deemed to exist or to bind any of the parties.

12.14 **Authorization.** The County has executed this Agreement following passive review by its Board of Supervisors on May 19, 2016.

>REMAINDER OF PAGE IS BLANK WITH SIGNATURES TO FOLLOW ON NEXT PAGE<

IN WITNESS WHEREOF, the parties hereto have executed this agreement on the day, month, and year above written:

FOR MILWAUKEE COUNTY:

FOR NORTHWOODS:

BY: _____ DATE: _____
Laurie Panella, CIO
Department of Administrative Services
Information Management Services Division

BY: _____ DATE: _____
NAME: _____

TITLE: _____

TAXPAYER ID No.: _____

IF PRINCIPAL IS A CORPORATION, IMPRINT
CORPORATE SEAL.

**REVIEWED AS TO INSURANCE
REQUIREMENTS:**

**REVIEWED REGARDING THE DISADVANTAGED
BUSINESS ENTERPRISE REQUIREMENTS;
approved with regards to County Ordinance Chapter
42:**

BY: _____ DATE: _____
Risk Manager
Office of Risk Management

BY: _____ DATE: _____
**Community Business
Development Partners**

**APPROVED AS TO FUNDS AVAILABLE PER
WISCONSIN STATUTES §59.255(2)(e):**

**APPROVED REGARDING FORM AND
INDEPENDENT CONTRACTOR STATUS:**

BY: _____ DATE: _____
Office of the Comptroller

BY: _____ DATE: _____
Corporation Counsel

**APPROVED AS COMPLIANT UNDER §59.42(2)(b)s,
STATS.:**

BY: _____ DATE: _____
Chris Abele, County Executive
Office of the County Executive

BY: _____ DATE: _____
Corporation Counsel

Attachment A

(See next page for Schedule.)

County Schedule ____

Schedule Effective Date:

Schedule Term:

_____ Project Manager:

Telephone:

Facsimile:

This Schedule is subject to and made a part of the Professional Services Agreement by and between Milwaukee County, ("County") and _____ ("Contractor"), with an Effective Date of _____ (the "Agreement"). All capitalized terms used in this Schedule are as defined in the Agreement, unless otherwise expressly defined herein.

Objective/Scope of Services to be Performed as originally identified in the Contractor's Response to the County's RFP, and as noted and attached to this Schedule:

County's Responsibilities:

Services to be rendered by Contractor:

Deliverables to be provided by Contractor include:

Due Dates:

Contractor's Fee and Payment Schedule:

Contractor Project Manager:

Address:

Telephone:

Facsimile:

_____ **Project Manager:**

Address:

Telephone:

Facsimile:

IN WITNESS WHEREOF, the parties hereto have caused this Schedule to be executed by their duly authorized officers or representatives.

_____ **(County)**

_____ **(Contractor)**

Authorized Signature

Authorized Signature

Print Name

Print Name

Title

Title

Attachment B
Milwaukee County Request for Proposal #98150016

Request for Proposal # 98150016

December 2, 2015

Dear Prospective Supplier:

Milwaukee County – Information Management Services Division (‘IMSD’) is seeking qualified respondents to provide proposals for *County-wide Branding, Website Design & Development*. The attached RFP defines and documents our functional needs while establishing consistent specifications against which Supplier proposals will be evaluated. IMSD and/or its designees will review all Supplier responses.

Responses to this RFP and all subsequent materials submitted by IMSD are to be treated as strictly confidential. The Supplier must not forward any such materials or otherwise disclose their content to any third party, or employees of the Supplier currently under contract for IMSD, for evaluation or for any other purpose without IMSD’s written consent.

Your goals are to clearly and precisely meet the needs outlined in the RFP with the best total cost, quality, and delivery. Additionally, you should develop and present your cost bid with the intention that it represents your “best” offer. Please note that IMSD reserves the right to reject any or all bids and request a reconsideration of a bid.

Please deliver your proposal by **3:00 p.m. CDT December 30, 2015** as outlined in the attached RFP.

Please submit the cover page acknowledging receipt of the RFP and your agreement with the Non-Disclosure Agreement (NDA) as shown in Appendix A no later than 2:00 p.m. on Wednesday, December 9, 2015, to:

Stephanie Gulizia, RFP Administrator
633 W. Wisconsin Ave.
Suite 901
Milwaukee, WI 53203
Stephanie.gulizia@milwaukeeCountywi.gov

If the cover page and NDA are not received by 2:00 pm December 9, 2015, your proposal may not be given consideration. We appreciate your consideration, timeliness and assistance in this matter and look forward to receiving your proposal.

Sincerely,

Milwaukee County - IMSD
633 West Wisconsin Avenue
Milwaukee, WI 53203

RFP Administrator
Stephanie Gulizia
Department of Administrative Services
Procurement Division

<p><i>We acknowledge receipt of the RFP and agree to Appendix A – Non-Disclosure Agreement (NDA).</i></p> <p>Signature: _____</p> <p>Supplier: _____</p> <p>Date: _____</p>
--

**Milwaukee County
Branding, Website Design, Development
Request for Proposal
December 2, 2015**

INFORMATION SUMMARY SHEET

Request for Proposal Title: Branding, Website Design & Development

Request for Proposal Number: 98150016

Request for Proposal Issuing Office: Milwaukee County-IMSD

Request for Proposal Issue Date: December 2, 2015

Optional Pre-Proposal Meeting: December 10, 2015 at 10:00 a.m.
633 W. Wisconsin Ave., 4th Floor Conference Center
Milwaukee, WI 53203
**Please contact RFP Administrator for dial-in
instructions if you would like to attend by phone.**

Written Questions Due: December 11, 2015 at 5:00 p.m.

RFP Receipt Deadline: December 30, 2015 at 3:00 p.m.

Service Starting Date: February 1, 2016

RFP Submission Location: Milwaukee County Courthouse
County Clerk's Office
Room 105
901 N. 9th Street
Milwaukee, WI 53233

RFP Administrator: Stephanie Gulizia
633 W. Wisconsin Ave.
Suite 901
Milwaukee, WI 53203
(414) 278-4129
Stephanie.gulizia@milwaukeeCountywi.gov

This RFP can be found on Milwaukee County's website at its Business Opportunity Portal:
<http://county.milwaukee.gov/bop>

Table of Contents

1.0 General Information	4
2.0 Scope of Project	4
3. Timetable for Proposals, Selection, and Award Process	7
3.1 Timetable for Proposal	7
4.3 Proposer Notification Requirement and Amendment Acknowledgement	9
4.4 Firm Commitment, Availability, Proposal Validity	9
4.5 Non-Interest of County Employees and Officials	9
4.6 Code of Ethics	10
4.7 Errors, Omissions, Minor Irregularities and Retained Rights	10
4.8 Multiple Proposals	11
4.9 Proposal Acceptance, Rejection, Cancellation and Withdrawal	11
4.10 Contract Terms and Funding	11
4.11 Contract Termination	12
4.12 Fee Adjustment	12
4.13 Payment Requirements	12
4.14 Minimum Wage Rate.....	12
4.15 Disadvantaged Business Enterprise (DBE) Utilization.....	13
4.16 EEOC Compliance.....	13
4.17 Insurance and Indemnity Requirements	13
4.18 Employees.....	14
4.19 Federal, State and Local Regulations.....	14
4.20 Security and Background Checks.....	14
4.21 Responsible Contractor Policy.....	14
4.22 Discipline or Discharge of Employees	14
4.23 Prime Contractor and Subcontractors	15
4.24 Compliance with Regulations and Laws	15
4.25 Right to Reject Proposals and Negotiate Contract Terms	15
4.26 Exceptions.....	15
4.27 Intent to Award	15
4.28 Information Release.....	16
4.29 Appeal	16
5.1 General Instructions.....	16
5.2 Incurred Expenses.....	17
5.3 Submitting a Proposal.....	17
6.1 Preliminary Evaluation	18
6.2 Proposal Scoring.....	18
Appendix A: Non-Disclosure Agreement	26

1.0 General Information

The purpose of this RFP is to provide interested parties with sufficient information to prepare and submit a proposal to meet the needs of Milwaukee County for the provisions of branding, website design & development.

Milwaukee County has over 40 departments & divisions, 8 county-wide elected officials, 18 County Supervisors, 47 elected judges and over 4,000 employees who work collectively to provide efficient and effective services to residents throughout the County. The County's internet and intranet websites are tools to provide direction, clarity, resources and to tell the Milwaukee County story.

Milwaukee County currently supports www.county.milwaukee.gov, www.mcintranet.gov as well as www.GoMilwaukee.gov, a landing page providing access to the City of Milwaukee website as well as Milwaukee County. The County's public facing site, www.county.milwaukee.gov, is the primary tool used to disseminate information about County services to the public. It is built in Titan, with ASP.NET and SQL Server, and contains over 23,000 pages and more than 144,000 documents. It is maintained with a Content Management System. The site currently receives 861,000 visits per month and generates 2,001,000 page views. The internal facing site, www.mcintranet.gov, provides information for County employees related to each department in the County. It is the resource employees are encouraged to embrace and use. Ultimately, success will be defined by an external as well as an internal site that is interactive, integrated, user friendly and intuitive and fully accessible. The site will brand Milwaukee County in a way that is recognizable, memorable and modern.

It is the intent of the County to host and maintain the site.

2.0 Scope of Project

The primary focus of the RFP includes the design and development of Milwaukee County and the County-owned websites, sub sites, and intranet. A secondary interest is for a brand and visual consistency for the County.

Milwaukee County is most interested in the creation of a robust, engaging and approachable website that provides important information for taxpayers, residents, and employees of Milwaukee County. It is the County's desire to develop and integrate current and emergent technologies to not only support digital marketing but to promote Milwaukee County services and support cross-communication among business units and partners. The County will provide copy/content from various departments and resources so that the selected agency can create a "voice" and craft the copy/content for the website, intranet and sub sites. Finally, the County expects that the successful agency will leverage emergent technologies to lead design development, train content administrators, develop training artifacts, and guide the change leadership and management process.

While brand development is not the primary focus of this RFP, it will be important for the successful agency to work in partnership with Milwaukee County to work within the existing brand foundation that will best represent Milwaukee County while not respecting individual department identities to achieve a consistent brand and visual identity. This basic brand identity will help create a visually appealing and memorable presence for Milwaukee County, but is not intended to be a county-wide strategic initiative nor the bulk of this project. The successful agency will also work in partnership with the County to craft policy and procedures for uses, submissions, permissions and the like for all things, website, intranet and brand related.

2.1 Objectives

Provide Milwaukee County residents with accurate, relevant, easily accessible and actionable information, as well as the ability to conduct transactions, both monetary and non-monetary, with County departments.

Provide Milwaukee County residents and employees with a user friendly site that enhances communication.

Provide modern, state-of-the-art functionality that includes mobile and tablet browsers while conforming to ADA best practices.

Provide a solution that integrates emergent technologies to enable:

- 1) Improved efficiency and productivity
- 2) Better marketing and communication effectiveness

Provide a brand foundation on which the County may continue to build. Ensure that the brand can support any specialized needs of departments for identity and / or marketing.

2.2 Key Project Activities and Deliverables

Provide a current state analysis, needs analysis and gap analysis for the County's internet and intranet

Identify requirements for departments and divisions for both external and internal communications, as well as transactions.

Lead the County through the design process. Ensure that public input and needs are taken into account in developing requirements.

Create and implement processes whereby internet and intranet content developed by departments can be standardized and rendered in a consistent Milwaukee County look, feel and voice.

Provide project management services throughout engagement to ensure successful engagement and results.

2.3 Design Needs

Work with County graphic designers and others to develop a brand foundation that enables County departments to accomplish their marketing objectives.

Provide a look and feel that is consistent and builds on the Milwaukee County brand, yet takes into account any department-specific identity and marketing needs.

Explore and apply as appropriate innovative trends to enhance website design and user experience.

Collaborate with County departments to ensure the intranet design meets the needs of various internal customers.

2.4 Development Needs

While it is not exclusively mandated, and the County is open to suggestion, preference will be given to supplier proposals that are based on the use of Titan CMS (<http://titancms.com/home.htm>).

Provide programming to support websites and digital platforms, including responsive design.

Provide programming to support iOS and Android application development.

Provide database design and management.

Improve usability of websites by providing leadership in technical innovation.

Develop and execute strategic website initiatives.

Maximize search engine optimization strategies to increase organic search results.

Provide databases/content management systems that support websites and foster effective collaboration and communication with industry/vendor partners.

Update and implement the website technology so that web metrics are used and maximized.

Identify and formalize use of web social networking tools.

Redesign the website so that visitors with disabilities can understand, navigate and interact with the new website.

Provide full integration with existing and future e-commerce applications.

Provide multi-lingual options.

2.5 Digital Marketing

Develop and implement SEO strategies that support the goal of maximizing traffic and optimizing organic search results.

Capture and report website traffic analytics and trends.

Provide a testing platform to evaluate user experience and make recommendations for improvement.

2.6 Implementation and Rollout Support

Provide support to departments in understanding and identifying content requirements and formats.

Provide standards to departments for site maintenance and support.

Provide training and necessary tools to departments to be able to participate in internet and intranet development activities, as well as to support post-implementation updates and processes.

3. Timetable for Proposals, Selection, and Award Process

3.1 Timetable for Proposal

Event	Scheduled Date	Responsibility
RFP Released	December 2, 2015	Milwaukee County
Cover Page Returned (3pm CDT)	December 9, 2015	All Proposers
Optional Pre Proposal Meeting (10am CDT)	December 10, 2015	Interested Proposers
RFP Questions Due (5pm CDT)	December 11, 2015	All Proposers
Responses Due (3pm CDT)	December 30, 2015	All Proposers
Supplier Presentations by Supplier Finalists Begin (if required)	January 11, 2015	Invited Proposers
Target for Supplier Selection Announcement	January 15, 2015	Milwaukee County
Initiation of contract	February 1, 2016	Selected Proposer

4. General Terms and Conditions for this RFP

4.1 Questions

Proposers may submit questions and requests for clarification regarding this RFP. All questions regarding this RFP shall be made in writing, citing the RFP title, RFP number, page, section, and paragraph, and shall be submitted via e-mail to RFP Contact/Administrator, Stephanie Gulizia, Stephanie.gulizia@milwaukeecountywi.gov.

Questions sent to anyone other than the RFP Contact/Administrator will not be considered.

All questions must be submitted by the specified deadline as identified on the Information Summary Sheet.

Milwaukee County will not respond to any questions received after this date and time. Responses to all questions and inquiries received by Milwaukee County will be posted on Milwaukee County's website as identified in the Information Summary Sheet. It is the responsibility of Proposers to check this website for any and all information such as answers or addenda related to the RFP. **Answers are not binding upon Milwaukee County unless and until questions are received in writing, and answers are provided in writing and posted publicly on the Business Opportunity Portal.**

This RFP is issued by IMSD. The RFP Administrator assigned to this RFP, along with contact information, is noted. The RFP Administrator is the sole point of contact during this process and no information provided by any other personnel will be considered binding. Communication initiated by a proposer to any County official, employee or representative evaluating or considering the proposals, prior to the time of any award is prohibited unless at the explicit direction of the RFP Contact/Administrator and any such unauthorized communication may constitute grounds for rejection or elimination of a proposal from further consideration, in the sole discretion of the County.

4.2 Pre-Proposal Meeting

A pre-proposal conference will be held at a date, time, and location as provided on the Information Summary Sheet. The purpose of this meeting will be to discuss with prospective proposers the work to be performed and to allow them to ask questions arising from their review of the RFP. The pre-proposal meeting is for information only. Any answers furnished will not be official until verified in writing by RFP Administrator. Answers that change or substantially clarify the RFP will be affirmed in writing and posted on the website via an addendum. The pre-proposal meeting will be the proposers' only opportunity to personally address questions concerning this RFP. Milwaukee County encourages participation at the pre-proposal conference of prime subcontractors.

During the pre-proposal conference, attendees may request clarification of any section of the RFP and ask any other relevant questions relating to the RFP.

Proposers are encouraged to submit written questions via e-mail to stephanie.gulizia@milwaukeecountywi.gov for possible response at the pre-proposal conference to RFP Contact/Administrator (date and time provided in the Information Summary Sheet) to enable Milwaukee County to formulate its oral response provided at the conference. No oral or written responses will be given prior to the mandatory pre-proposal conference. Again, any responses provided to questions during the pre-proposal conference and site inspections will be considered drafts, and will be non-binding.

Remarks and explanations at the conference shall not qualify the terms of the solicitation; and terms of the solicitation and specifications remain unchanged unless the solicitation is amended in writing. Milwaukee County at its sole discretion reserves the right to answer or not answer questions submitted to by deadlines.

4.3 Proposer Notification Requirement and Amendment Acknowledgement

Should any proposer discover any significant ambiguity, error, omission or other deficiency in the RFP document, they must immediately notify the RFP Contact/Administrator in writing, via email, prior to the submission of the proposal. The failure of a proposer to notify the RFP Contact/Administrator of any such matter prior to submission of its proposal constitutes a waiver of appeal or administrative review rights based upon any such ambiguity, error, omission or other deficiency in the RFP document.

If it becomes necessary to clarify or revise any part of this RFP, amendments will be posted to the Milwaukee County website; it is the responsibility of prospective vendors to check the website for any amendments prior to the RFP submission date. All amendments are acknowledged by your submission of Sworn Statement of Bidder form.

If the Proposer fails to monitor the web site for any changes or modifications to the RFP, such failure will not relieve the Proposer of its obligation to fulfill the requirements as posted.

4.4 Firm Commitment, Availability, Proposal Validity

Proposers shall maintain their availability of service and proposed price as set forth in their proposals for an anticipated service starting date provided in the Information Summary Sheet. Proposers are expected to perform planning and implementation activities prior to commencement of a contract. Milwaukee County will not reimburse for these costs.

4.5 Non-Interest of County Employees and Officials

No County official, employee or representative on the evaluation committee shall have any financial interest, either direct or indirect, in the proposal or contract or shall exercise any undue influence in the awarding of the contract.

No Milwaukee County employee, officer or agent shall participate in the selection, award or administration of a contract if a conflict of interest, real or apparent, would be involved.

Milwaukee County Specific Requirements; No person(s) with a personal financial interest in the approval or denial of a contract or proposal being considered by a County department or with an agency funded and regulated by a County department, shall make a campaign contribution to any County elected official who has approval authority over that contract or proposal during its consideration. Contract or proposal consideration shall begin when a contract or proposal is submitted directly to a County department or to an agency funded or regulated by a County department until the contract or proposal has reached final disposition, including adoption, County executive action, proceedings on veto (if necessary) or departmental approval.

4.6 Code of Ethics

Proposers shall strictly adhere to Chapter 9 of the Milwaukee County Code of General Ordinances Code of Ethics, with particular attention to Subsection 9.05(2)(k):

“No campaign contributions to County officials with approval authority: No person(s) with a personal financial interest in the approval or denial of a contract or proposal being considered by a County department, or with an agency funded and regulated by a County department, shall make a campaign contribution to any County elected official who has approval authority over that contract or proposal during its consideration. Contract or proposal consideration shall begin when a contract or proposal is submitted directly to a County department or to an agency funded or regulated by a County department until the contract or proposal has reached final disposition, including adoption, County executive action, proceedings on veto (if necessary) or departmental approval. This provision does not apply to those items covered by section 9.14 unless an acceptance by an elected official would conflict with this section. The language in subsection 9.05(2)(k) shall be included in all Requests for Proposals and bid documents.”

4.7 Errors, Omissions, Minor Irregularities and Retained Rights

All information in this RFP, including any addenda, has been developed from the best available sources; however, Milwaukee County makes no representation, warranty or guarantee as to its accuracy. Should proposer discover any significant ambiguity, error, omission or other deficiency in the RFP document, they must immediately notify the RFP Contact/Administrator in writing, via email, prior to the submission of the proposal. The failure of a proposer to notify the RFP Contact/Administrator of any such matter prior to submission of its proposal constitutes a waiver of appeal or administrative review rights based upon any such ambiguity, error, omission or other deficiency in the RFP document. Milwaukee County reserves the right to waive minor irregularities in proposals. Minor irregularities are defined as those that have no adverse effect on the outcome of the selection process by giving a Proposer an advantage or benefit not afforded by other Proposers. Milwaukee County may waive any requirements that are not material. Milwaukee County may make an award under the RFP in whole or in part and change any scheduled dates. Milwaukee County reserves the right to use ideas presented in reply to this RFP notwithstanding selection or rejection of proposals. Milwaukee County reserves the right to make changes to and/or withdraw this RFP at any time.

4.8 Multiple Proposals

Multiple proposals from a proposer will not be permitted.

4.9 Proposal Acceptance, Rejection, Cancellation and Withdrawal

Each proposal is submitted with the understanding that it is subject to negotiation at the option of Milwaukee County. However, Milwaukee County reserves the right to make an award on the basis of the original proposal, without negotiation with any proposer.

Milwaukee County reserves the right to negotiate with the proposer(s) within the scope of the RFP in the best interests of Milwaukee County. Milwaukee County may request and require clarification at any time during the procurement process and/or require correction of arithmetic or other apparent errors for the purpose of assuring a full and complete understanding of a proposal and/or to determine a proposer's compliance with the requirements of the solicitation. Milwaukee County may use information obtained through site visits, management interviews and the County's investigation of a proposer's qualifications, experience, ability or financial standing, and any material or information submitted by the proposer in response to the County's request for clarifying information in the course of evaluation and/or selection under this RFP.

Upon acceptance in writing by Milwaukee County of the final offer to furnish any and all of the services described herein, and upon receipt of any required federal, state and local government approvals, the parties shall promptly execute the final contract documents. The written contract shall bind the proposer to furnish and deliver all services as specified herein in accordance with conditions of said accepted proposal and this RFP as negotiated.

Milwaukee County reserves the right to accept or reject any and all proposals submitted or cancel this RFP in whole or in part if such cancellation is in the best interest of Milwaukee County. Prior to the date and time set forth as the Proposal Receipt Deadline, proposals may be modified or withdrawn by the proposer's authorized representative. After the proposal deadline, proposals may not be modified or withdrawn without the consent of Milwaukee County.

4.10 Contract Terms and Funding

The contract shall be between the County of Milwaukee, known as the "County" and the successful proposer known as the "Contractor".

Responses to this RFP should be based upon that the initial term of the agreement of one year with an option for two (2) additional one-year extensions, by mutual agreement of the County and Contractor.

Continuance of the contract beyond the limits of funds available shall be contingent upon appropriations of the necessary funds and the termination of this contract by lack of appropriations shall be without penalty. All proposers are notified that Milwaukee County

reserves the right to delete or modify any task from the Scope of Services at any time during the course of the bid process. All proposers are notified that contracts are contingent upon Federal, State, and local appropriations.

Milwaukee County contemplates award of a contract resulting from this RFP that reflects payment for fee for services. Any final contract structure resulting from this RFP may be subject to negotiation and the required approvals by Milwaukee County.

4.11 Contract Termination

Milwaukee County in its sole discretion may, in the case of a termination for breach or default, allow the Contractor 30 days in which to cure a defect. In such case, the notice of termination will state the time period in which cure is permitted and other appropriate conditions. Milwaukee County, by written notice, may terminate this contract, in whole or in part, when it is in the Government's interest. If this contract is terminated, Milwaukee County shall be liable only for payment under the payment provisions of this contract for services rendered before the effective date of termination.

In the event the Contractor terminates the contract, such termination will require written notice to that effect to be delivered by the Contractor to the County not less than ninety (90) days prior to said termination and shall assist and provide for an orderly transition of services.

4.12 Fee Adjustment

The price established by a contract shall remain fixed for the first (1st) year, and may be adjusted for subsequent contract extensions. Any proposed price adjustment shall be submitted to the County no later than May 1 of the year preceding the year for which an adjustment is requested, and if approved, will be effective on that date for the subsequent contract period. Fees may be changed only on the contract anniversary date. These fees are subject to negotiation and approval by the County.

4.13 Payment Requirements

Continuance of the contract beyond the limits of funds available shall be contingent upon appropriations of the necessary funds and the termination of this contract by lack of appropriations shall be without penalty.

Milwaukee County reserves the right to make payments through a Purchasing Card.

4.14 Minimum Wage Rate

This RFP, acquisition and any resulting agreement must conform to Chapter 111 of the Milwaukee County Code of General Ordinance – Minimum Wage.

In accordance with Chapter 111 of the Milwaukee County Code of General Ordinances, it is the policy of Milwaukee County that certain contractors, subcontractors, lessees and

recipients of financial assistance doing business with the County shall pay employees performing part or full time work for the County a minimum wage rate. This rate is currently established at \$11.66/hour.

As a matter of responsiveness to this RFP, all proposers must complete 'Attachment B – Declaration of Commitment to Compliance to Milwaukee County's Minimum Wage Provision'.

It is the proposer's responsibility to familiarize themselves with the requirements of MCGO Chapter 111 and maintain compliance.

Additional information can be found at:

<http://County.milwaukee.gov/ImageLibrary/Groups/cntyDAS/Procurement/livingwage.pdf> https://library.municode.com/HTML/12598/level2/MICOCOGEOORVOI_CH111MIWA.html

4.15 Disadvantaged Business Enterprise (DBE) Utilization

The award of this contract is conditioned upon your good faith efforts in achieving this project's Disadvantaged Business Enterprise (DBE) goal of 17%, and you must document those efforts. Your Proposal must state how you will meet the goal, including identifying the DBE firm(s) by name, the scope(s) of work/service(s) to be provided, the dollar amount(s) of such work, and the percentage of the DBE goal to be met. Failure to do this will result in a determination of non-responsiveness, and rejection of your Proposal will occur. During the Contract, the successful Proposer will use the County's online reporting system to document DBE participation. The Disadvantaged Business Enterprise (DBE) Requirements and forms to be used are attached to this RFP as Attachment K.

A necessary step in the good faith efforts process is contacting Community Business Development Partners (CBDP) at 414-278-4747 or cbdp@milwaukeecountywi.gov for assistance in identifying DBE's and understanding the County's DBE Program procedures. The official directory of eligible DBE firms can be accessed at <https://app.mylcm.com/wisdot/Reports/WisDotUCPDirectory.aspx>.

4.16 EEOC Compliance

All proposers shall complete and submit Equal Employment Opportunity Commission (EEOC) Compliance Certificate (Attachment H).

4.17 Insurance and Indemnity Requirements

All proposers shall complete, sign and submit the "Insurance and Indemnity Acknowledgement Form" (Attachment C). This form outlines required insurance requirements for Contractor related to this acquisition and proposer's ability and commitment to provide.

4.18 Employees

The Contractor shall utilize as many permanent employees on this contract whenever possible. The Contractor shall utilize only workers that are skilled in the tasks to which they are assigned and can provide the highest quality of performance consistently on a daily basis. A contractual commitment of dependable, steady service is required.

4.19 Federal, State and Local Regulations

The successful Proposer shall be required, and hereby agrees, to comply with all applicable Federal, State and Local laws and regulations during the term of any agreement, including, but not limited to the regulations listed in this RFP. Successful proposers will be required to enter into and maintain an agreement with Milwaukee County that complies with all Federal, State, and local, health, accessibility, environmental and safety laws, regulations, standards and ordinances.

4.20 Security and Background Checks

Security background checks shall be conducted for all employees prior to starting work.

4.21 Responsible Contractor Policy

The County of Milwaukee recognizes superior service requires that service Contractors hire well-trained and dedicated staff, assuring the availability of a qualified staff and avoiding labor disruption and costly employee turnover to treat workers fairly and to abide by applicable labor laws. The County of Milwaukee supports the development of a healthy business environment. Therefore, the County of Milwaukee maintains the following requirement. Contractors shall abide by all applicable local, state and federal laws. Contractors shall at all times maintain safe and healthful working conditions and abide by all applicable wage and hour regulations and prohibitions against child labor. Contractors' working conditions shall conform to the standards set by the Federal OSHA. Contractors shall on request provide to the County a report on their compliance. The County recognizes the right of employees to self-organization and the right to form, join or assist labor organizations to bargain collectively through representatives of their own choosing, and to engage in lawful, concerted activities for the purpose of collective bargaining or other mutual aid or protection and, conversely, the right of such employees to refrain from any or all such activities. All proposers shall provide working conditions for services of a similar character in a similar locality in which the services are performed.

4.22 Discipline or Discharge of Employees

Any Contractor's employee whose employment or performance is objectionable to the County shall be immediately transferred from the premises. A request by the County to transfer an employee shall not constitute an order to discipline or discharge the employee. All actions taken by the Contractor in regard to employee discipline shall be at the sole discretion of the Contractor. The County shall be held harmless in any disputes the

Contractor may have with the Contractor's employees. This shall include, but is not limited to, charges of discrimination, harassment, and discharge without just cause.

4.23 Prime Contractor and Subcontractors

The prime Contractor will be responsible for contract performance when subcontractors are used. Subcontractors may be used only with the written permission and approval of the County, and shall have the same contract terms and conditions as prime Contractors. However, when subcontractors are used, they must abide by all terms and conditions of the contract. If subcontractors are to be used, the proposer must clearly explain their participation in the proposal response documents.

4.24 Compliance with Regulations and Laws

The successful firm shall comply with all applicable Federal, State, and local laws, regulations and policies including, without limitation, those pertaining to wages and hours of employment.

4.25 Right to Reject Proposals and Negotiate Contract Terms

The County reserves the right to reject any and all proposals.

4.26 Exceptions

Review the RFP in its entirety and indicate any exceptions you are taking to requirements defined in the RFP. If exceptions are taken, cite the paragraph involved, the exception taken, and state alternate language acceptable to the Respondent. Alternative language is subject to negotiation and/or approval. Any and all exceptions must be stated in your proposal.

4.27 Intent to Award

An Intent to Award will be issued and all proposers will be notified. Milwaukee County reserves the right to negotiate with the selected proposer, at its option, regarding the terms of a contract and other issues to be incorporated into the contract.

In the event that a successful agreement cannot be executed, Milwaukee County reserves the right to proceed with contract negotiations with the other responsive, qualified bidders to provide service.

Prior to execution of any final agreement, Risk Management shall make a recommendation of award and request approval of the County Executive and the County Board of Supervisors, if required. An agreement will only be fully executed following final approval by the County Board of Supervisors and County Executive, as and if required.

4.28 Information Release

All materials submitted become the property of Milwaukee County. Any restriction on the use of data contained within a request must be clearly stated in the bid itself. Proprietary information submitted in response to a request will be handled in accordance with applicable Milwaukee County Ordinances, State of Wisconsin procurement regulations, and the Wisconsin public records law. Proprietary restrictions normally are not accepted. However, when accepted, it is the vendor's responsibility to defend the determination in the event of an appeal or litigation.

Data contained in a Request for Proposal, all documentation provided therein, and innovations developed as a result of the contracted commodities or services cannot be copyrighted or patented. All data, documentation and innovations become the property of Milwaukee County.

Milwaukee County may, at any time during the procurement process, request and/or require additional disclosures, acknowledgments, and/or warranties, relating to, without limitation, confidentiality, EEOC compliance, collusion, disbarment, and/or conflict of interest.

Any materials submitted by the applicant in response to this Request for Proposal that the applicant considers confidential and proprietary information and which proposer believes qualifies as a trade secret, as provided in s. 19.36(5), Wis. Stats, or material which can be kept confidential under the Wisconsin public record law, must be identified on the Designation of Confidential and Proprietary Information form (Attachment J – Proprietary Information Disclosure). Confidential information must be labeled as such. Costs (pricing) always becomes public information and therefore cannot be kept confidential. Any other requests for confidentiality MUST be justified in writing on the form provided and included in the bid submitted. Milwaukee County has the sole right to determine whether designations made by a proposer qualify as trade secrets under the Wisconsin public records law.

4.29 Appeal

Protests and appeals related to this RFP after issuance of an "Intent to Award" are subject to the provisions of the Milwaukee County Code of General Ordinances, Chapter 110. Appeal process information is available at [http://www.municode.com/Library/WI/Milwaukee County](http://www.municode.com/Library/WI/Milwaukee_County).

5. Preparing and Submitting a Proposal

5.1 General Instructions

In an effort to ensure the most efficient and economical service, the County utilizes Competitive Negotiation, or the Request for Proposal (RFP) process to procure certain services. This process bases the contract award on the County's evaluation of work history,

technical experience, ability, resources and other pertinent factors of the Proposer in conjunction with the total cost estimate.

5.2 Incurred Expenses

Milwaukee County shall not be responsible for any cost or expense incurred by the proposers preparing and submitting a proposal or cost associated with meetings and evaluations of proposals prior to execution of an agreement. This includes any legal fees for work performed or representation by proposer's legal counsel during any and all phases of the RFP process, any appeal or administrative review process, and prior to County Board approval of a contract award.

5.3 Submitting a Proposal

Proposers must submit one (1) original and seven (7) copies of all materials required for acceptance of their proposal in sealed envelopes. Submission must be to the specific location and prior to submission deadline indicated on the 'Information Summary Sheet'. Each hard copy should be double-sided and bound, with the exception of the original, which should be double-sided but not bound.

All proposals must be time-stamped as accepted by Milwaukee County by the stated time. Proposals not so stamped will not be accepted. If hand delivering proposals please allow adequate time for travel, parking, and security screening.

Proposals shall be organized and presented in the order and by the number assigned in the RFP. Proposals shall be organized with each heading and be clearly marked and separated by tabs or otherwise clearly marked. Proposals that fail to provide any requested information will be considered unresponsive.

All proposals shall consist of two submissions: Technical Proposal and Cost Proposal. Each proposal must be submitted in a separate envelope and marked as requested below.

Your responses should be submitted as follows:

Technical Proposal Contents

- Cover Sheet for Technical Proposal (Attachment F)
- Responses to Request(s)
- Vendor Information Sheet (Attachment A)
- Insurance and Indemnity Acknowledgement Form (Attachment C)
- Conflict of Interest Stipulation (Attachment D)
- Sworn Statement of Bidder (Attachment E)
- EEOC Compliance (Attachment H)
- Certification Regarding Debarment and Suspension (Attachment I)
- Proprietary Information Disclosure Form (Attachment J)
- Declaration of Commitment to Compliance with Milwaukee County's Minimum Wage Provision (Attachment B)

Cost Proposal Contents

Cover Sheet for Pricing Proposal (Attachment G)
Cost Proposal Submission Form
Disadvantaged Business Enterprise Forms (Attachment K)

Proposals submitted in response to this RFP must be received no later than the deadline as identified in the Information Summary Sheet.

Both Technical and Cost Proposals shall be identified in the lower left corner as follows:

Technical Proposal

Request For Proposal Title: (Title as provided on the Information Summary Sheet)
Request For Proposal Number: (Number as provided on the Information Summary Sheet)
RFP Proposal Receipt Deadline: (Date as provided on the Information Summary Sheet)

And

Cost Proposal

Request For Proposal Title: (Title as provided on the Information Summary Sheet)
Request For Proposal Number: (Number as provided on the Information Summary Sheet)
RFP Proposal Receipt Deadline: (Date as provided on the Information Summary Sheet)

6. Proposal and Award Process

6.1 Preliminary Evaluation

The proposals will be reviewed to determine if mandatory submission requirements are met. Failure to meet mandatory submission requirements will result in rejection of the proposal. Proposals that do not comply with submittal instructions established in this document and/or that do not include the required information will be rejected as non-responsive. The Proposer assumes responsibility for meeting submission requirements and addressing all necessary technical and operational issues to meet the objectives of the RFP.

6.2 Proposal Scoring

An Evaluation Committee will be established by Milwaukee County to evaluate all responsive proposals and to make a recommendation. A proposer may not contact any member of an evaluation committee except at the RFP Administrator's direction. Reference Section 4 Questions, herein, for additional information.

These proposals will be reviewed by an evaluation committee and scored against the criteria outlined in this RFP.

Technical Proposal scoring: The Evaluation Committee shall conduct its evaluation of the technical merit of all proposer's responsive proposals. The process involves applying the evaluation criteria and the associated weighting as outlined in the RFP to assess each vendor's

proposal. The criteria that will be used by the Evaluation Committee for the technical evaluation of this RFP are outlined below.

Cost Proposal scoring: Cost is one of the evaluation categories listed below and will be a defined percentage of the total RFP evaluation. Calculation of points to be awarded to lowest and each subsequent proposal will use the lowest dollar proposed amount as a constant numerator and the dollar amount of the proposer being scored as the denominator. The result then is multiplied by the total number of points provided in the cost section of the RFP. The lowest cost proposal will receive the maximum number of points available for the cost category. Other cost proposals will receive prorated scores based on their deviation above the lowest cost proposal.

The evaluation committee's scoring will be tabulated and proposals ranked based on the total numerical scores, comprising the sum of both technical and cost scoring.

Oral presentations may be requested by Milwaukee County of the highest scoring proposer(s). If oral presentations are requested, proposers will be notified of when the presentations are to take place and what information should be provided. Milwaukee County may request Best and Final Offers from any or all respondents. Best and Final Offers are a supplement to the original offer. Milwaukee County reserves the right to make an offer based on the original submitted proposal.

Following final evaluation, the Committee will make a recommendation to Milwaukee County's Chief Information Officer as to whose proposal is determined to provide the best value to Milwaukee County. Award may be made to the proposal with a higher technical ranking even if its price proposal is not the lowest. Final approval will be subject to Milwaukee County procurement policies and approvals.

The award of the contract, if made, shall be with an organization whose proposal provides the best value to Milwaukee County. Milwaukee County reserves the right to reject any and all proposals received if it deems appropriate and may modify, cancel or re-publish the RFP at any time prior to a contract being awarded up to and through final action of the County Board of Supervisors and the County Executive.

7. Scoring Criteria

Proposal will be scored based on the following criteria and points:

Technical Proposal

9.1-9.3	Proposer’s relevant experience, organizational capability	15
9.4.1.1-9.4.1.3	Website & Creative Design	30
9.4.2.1-9.4.2.2	Branding	5
9.5	Metrics, Project Management	15
9.6-9.11	Technical innovation, experience and past proven success	15

Cost Proposal

10.0	Cost	20
TOTAL		100

8. Technical Proposal Requirements

Technical proposals shall convey an understanding of the scope of services required. Technical proposals shall not contain any reference to price. Through its proposal, the proposer offers a solution to the objectives, problem, or need specified in the RFP, and defines how it intends to meet or exceed the RFP requirements.

RFP submission must address, at a minimum, the requests enumerated below. Please indicate for each response the number of the request that it addresses (e.g. Response to Request 1, Response to Request 2...).

Guidelines

- Each number should be retyped in your bid with the response immediately following. Questions should be in the same font/format and order as outlined in this section.
- Responses should be brief and direct and address all subset questions. Please do not reference any pre-printed materials.
- Responses should reflect your programs, organization, and administrative systems as they currently exist.
- Any questions asking for statistics should be answered with actual, not anticipated or target statistics.

Please address each of the following criteria/sections in your technical proposal:

9.1 Projects of Relevant Experience

9.1.1 It is required that within the last two years at least three sites have been designed by the selected agency. Describe those three sites and provide client contacts.

9.1.2 The selected agency will perform test code in a range of browser and mobile platforms and do beta testing and Q & A. Describe your experience in those areas.

9.1.3 The selected agency will work in partnership with the Milwaukee County team to drive this project. Describe your practices and experience working with government entities. Also describe your experience in working with large, complex clients.

9.1.4 Describe your experience and expertise creating websites that adhere to ADA best practices.

9.2 Organizational Capabilities

Describe your agency's/organization's experience and capabilities to deliver the services requested in this RFP. Please include:

9.2.1 How long your agency has been providing services requested in this RFP?

9.2.2 How many staff are currently employed to manage the services requested in this RFP?

9.2.3 What new accounts have been added to your roster in the last three years?

9.2.4 What accounts have been lost from your roster in the last three years? Why?

9.2.5 Provide your organization's total billings for years 2012, 2013, 2014.

9.2.6 Provide a list of clients for whom the agency had primary responsibility for branding as well as developing and designing a website.

9.3 Your Story

9.3.1 Briefly share your agency's story and include background/biographies on the proposed team for this work.

9.4 Scope Requirements

The following represents needs related to scope and must be included in your response.

9.4.1 Website and Creative Design

9.4.1.1 Describe your planning and creative process from beginning to final execution, including:

- Your organization's planning process for website design
- Strategic and long term planning
- Communication process with the client

9.4.1.2 Provide the URL for two websites of similar scope to www.county.milwaukee.gov that your organization has designed, and include a one-page single-spaced description for each URL that details the following:

- Client Background
- Client contact information
- Website user profile
- Reasoning for navigation and design

Successful features, functionality and design elements implemented to enhance the user experience
How you integrated the brand into the design

9.4.1.3 Describe one other government-focused web design project that your organization successfully completed.

9.4.2 Branding

9.4.2.1 Describe the process your agency uses to create a brand foundation that allows an organization to meet its marketing objectives? What are the deliverables?

9.4.2.2 Provide two branding examples of work similar to the requirements outlined in this RFP. Include client contact information for each example.

9.5 Project Approach

9.5.1 Goal Measurement

9.5.1.1 Explain how you measure success. Provide specific examples.

9.5.2 Project Management

9.5.2.1 Explain the following in regard to project management. Provide supporting documentation as appropriate:

Overall approach to project management including methods, tools and strategies
Progress reporting process
Issues Tracking (CMS maintenance / bug tracking)
Quality controls

9.6 Innovation

9.6.1 Explain how your organization addresses these digital trends in your design work:

Provide specific examples for:
Mobile and tablet
Content personalization
User interface design

9.7 Digital Marketing

9.7.1 Explain your approach to developing a search engine optimization strategy and recommendations for a website similar in scope and complexity to the County's site. Provide specific examples.

9.8 Subcontracting

9.8.1 Describe those aspects or parts of work that shall be performed by staff of your organization and those aspects or parts of the work that shall be subcontracted.

9.8.2 Explain the reasons for the in-house performance of those aspects or parts of the work you anticipate shall be performed in-house and explain the reasons for the anticipated performance of the remaining aspects or parts of the work to be performed by subcontractors.

9.8.3 Describe what you believe to be the advantages or disadvantages of using subcontractors.

9.9 Technical Innovations

9.9.1 Describe how your organization has kept up with technology during the past three years in the areas of:

- CMS platforms
- Website/data security
- Site search
- Search Engine Optimization
- Audio/Video delivery
- Mapping technologies
- User-customized content and widgets
- Data and/or content applications
- Mobile/wireless technologies
- Service orientated architecture
- Separation in content and display logic
- Security
- eCommerce and payments
- Social Media Integration
- ADA Best Practices

9.9.2 Describe how you identify and evaluate the effectiveness and applicability of emerging technologies to meet client needs.

9.9.3 Describe how the company provides strategic direction on implementing new technology. **Provide implemented examples, including text, screen shots and links.**

9.10 Database Design and Management

9.10.1 Describe and provide examples of your organization's experience in the following:

Legacy data conversion

Data Schema. Include information on both the creation of data schema and the evaluation of existing schema in order to recommend changes for efficiencies.

Management of large databases that support a website. Include an overview of the complexity of the site supported by the database and the number of records managed.

9.10.2 Describe (not more than 2 pages) your best example of a CMS or database design project of similar scope, indicating how you addressed the following:

Admin UX design

User Profile management- administrative and various levels of roles and responsibilities.

SEO considerations

Inline editing

Imagery and multimedia

Flexibility to mine fields that are customizable

Archiving data

Document tree management

Caching/load balancing

Scalability – administrative, functional, load and generation

Speed/load times in the CMS

Data migration / exporting of data

9.11 Web Application Development

9.11.1 Provide URL's or screen shots of your two best examples and a one page single-spaced description for each URL or screen shot of how your organization approaches its work as it pertains to web application development for the following:

Existing web properties that incorporate CMS

Extranets

9.11.2 In your description, address the strategy, technologies, methodologies and approach to prioritization of tasks, staff assignments, tracking, status updates and training as they pertain to maintaining and advancing web properties.

9.12 References

9.12.1 Provide three references of clients for whom the agency has performed branding, website development and design, and the services requested in this RFP.

10. Cost Proposal

Under separate cover proposer will submit a comprehensive, line item cost proposal that details all costs including:

Branding

Design

Development/Programming

Account Service

Training
Licensing Fees
Technical Assistance
Testing
Implementation
Installation
Any other costs (please specify)

Also, include hourly fees for additional services such as customization and other services (copy writing, photography) available, but perhaps not critical to implementation of this project. The sum total of the cost proposal should be the total cost of the project to Milwaukee County, with no exceptions.

Appendix A: Non-Disclosure Agreement

NON-DISCLOSURE AGREEMENT

THIS AGREEMENT (the "**Agreement**") is entered into on this ___ day of _____, 20____ by and between Milwaukee County, located at 633 W Wisconsin Ave, Ste 1117, Milwaukee, WI 53203 (the "**Disclosing Party**"), and _____ with an address at _____ (the "**Recipient**" or the "**Receiving Party**"). The Recipient hereto desires to participate in _____ for Milwaukee County (the "**Transaction**"). During these discussions, Disclosing Party may share certain proprietary information with the Recipient. Therefore, in consideration of the mutual promises and covenants contained in this Agreement, and other good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, the parties hereto agree as follows:

1. Definition of Confidential Information.

(a) For purposes of this Agreement, "**Confidential Information**" means any data or information that is proprietary to the Disclosing Party and not generally known to the public, whether in tangible or intangible form, whenever and however disclosed, including, but not limited to: (i) any marketing strategies, plans, financial information, or projections, operations, sales estimates, business plans and performance results relating to the past, present or future business activities of such party, its affiliates, subsidiaries and affiliated companies; (ii) plans for products or services, and customer or supplier lists; (iii) any scientific or technical information, invention, design, process, procedure, formula, improvement, technology or method; (iv) any concepts, reports, data, know-how, works-in-progress, designs, development tools, specifications, computer software, source code, object code, flow charts, databases, inventions, information and trade secrets; and (v) any other information that should reasonably be recognized as confidential information of the Disclosing Party. Confidential Information need not be novel, unique, patentable, copyrightable or constitute a trade secret in order to be designated Confidential Information. The Receiving Party acknowledges that the Confidential Information is proprietary to the Disclosing Party, has been developed and obtained through great efforts by the Disclosing Party and that Disclosing Party regards all of its Confidential Information as trade secrets.

(b) Notwithstanding anything in the foregoing to the contrary, Confidential Information shall not include information which: (i) was known by the Receiving Party prior to receiving the Confidential Information from the Disclosing Party; (b) becomes rightfully known to the Receiving Party from a third-party source not known (after diligent inquiry) by the Receiving Party to be under an obligation to Disclosing Party to maintain confidentiality; (c) is or becomes publicly available through no fault of or failure to act by the Receiving Party in breach of this Agreement; (d) is required to be disclosed in a judicial or administrative proceeding, or is otherwise requested or required to be disclosed by law or regulation, although the requirements of paragraph 4 hereof shall apply prior to any disclosure being made; and (e) is or has been independently developed by employees, consultants or agents of the Receiving Party without violation of the terms of this Agreement or reference or access to any Confidential Information.

2. Disclosure of Confidential Information.

From time to time, the Disclosing Party may disclose Confidential Information to the Receiving Party. The Receiving Party will: (a) limit disclosure of any Confidential Information to its directors, officers, employees, agents or representatives (collectively "**Representatives**") who have a need to know such Confidential Information in connection with the current or contemplated business relationship between the parties to which this Agreement relates, and only for that purpose; (b) advise its Representatives of the proprietary nature of the Confidential Information and of the obligations set forth in this Agreement and require such Representatives to keep the Confidential Information confidential; (c) shall keep all Confidential Information strictly confidential by using a reasonable degree of care, but not less than the degree of care used by it in safeguarding its own confidential information; and (d) not disclose any Confidential Information received by it to any third parties (except as otherwise provided for herein). Each party shall be responsible for any breach of this Agreement by any of their respective Representatives.

3. Use of Confidential Information.

The Receiving Party agrees to use the Confidential Information solely in connection with the current or contemplated business relationship between the parties and not for any purpose other than as authorized by this Agreement without the prior written consent of an authorized representative of the Disclosing Party. No other right or license, whether expressed or implied, in the Confidential Information is granted to the Receiving Party hereunder. Title to the Confidential Information will remain solely in the Disclosing Party. All use of Confidential Information by the Receiving Party shall be for the benefit of the Disclosing Party and any modifications and improvements thereof by the Receiving Party shall be the sole property of the Disclosing Party. Nothing contained herein is intended to modify the parties' existing agreement that their discussions in furtherance of a potential business relationship are governed by Federal Rule of Evidence 408.

4. Compelled Disclosure of Confidential Information.

Notwithstanding anything in the foregoing to the contrary, the Receiving Party may disclose Confidential Information pursuant to any governmental, judicial, or administrative order, subpoena, discovery request, regulatory request or similar method, provided that the Receiving Party promptly notifies, to the extent practicable, the Disclosing Party in writing of such demand for disclosure so that the Disclosing Party, at its sole expense, may seek to make such disclosure subject to a protective order or other appropriate remedy to preserve the confidentiality of the Confidential Information; provided in the case of a broad regulatory request with respect to the Receiving Party's business (not targeted at Disclosing Party), the Receiving Party may promptly comply with such request provided the Receiving Party give (if permitted by such regulator) the Disclosing Party prompt notice of such disclosure. The Receiving Party agrees that it shall not oppose and shall cooperate with efforts by, to the extent practicable, the Disclosing Party with respect to any such request for a protective order or other relief. Notwithstanding the foregoing, if the Disclosing Party is unable to obtain or does not seek a protective order and the Receiving Party is legally requested or required to disclose such Confidential Information, disclosure of such Confidential Information may be made without liability.

5. Term.

This Agreement shall remain in effect for a two-year term (subject to a one year extension if the parties are still discussing and considering the Transaction at the end of the second year). Notwithstanding the foregoing, the parties' duty to hold in confidence Confidential Information that was disclosed during term shall remain in effect indefinitely.

6. Remedies.

Both parties acknowledge that the Confidential Information to be disclosed hereunder is of a unique and valuable character, and that the unauthorized dissemination of the Confidential Information would destroy or diminish the value of such information. The damages to Disclosing Party that would result from the unauthorized dissemination of the Confidential Information would be impossible to calculate. Therefore, both parties hereby agree that the Disclosing Party shall be entitled to injunctive relief preventing the dissemination of any Confidential Information in violation of the terms hereof. Such injunctive relief shall be in addition to any other remedies available hereunder, whether at law or in equity. Disclosing Party shall be entitled to recover its costs and fees, including reasonable attorneys' fees, incurred in obtaining any such relief. Further, in the event of litigation relating to this Agreement, the prevailing party shall be entitled to recover its reasonable attorney's fees and expenses.

7. Return of Confidential Information.

Receiving Party shall immediately return and redeliver to the other all tangible material embodying the Confidential Information provided hereunder and all notes, summaries, memoranda, drawings, manuals, records, excerpts or derivative information deriving there from and all other documents or materials ("Notes") (and all copies of any of the foregoing, including "copies" that have been converted to computerized media in the form of image, data or word processing files either manually or by image capture) based on or including any Confidential Information, in whatever form of storage or retrieval, upon the earlier of (i) the completion or termination of the dealings between the parties contemplated hereunder; (ii) the termination of this Agreement; or (iii) at such time as the Disclosing Party may so request; provided however that the Receiving Party may retain such of its documents as is necessary to enable it to comply with its document retention policies. Alternatively, the Receiving Party, with the written consent of the Disclosing Party may (or in the case of Notes, at the Receiving Party's option) immediately destroy any of the foregoing embodying Confidential Information (or the reasonably nonrecoverable data erasure of computerized data) and, upon request, certify in writing such destruction by an authorized officer of the Receiving Party supervising the destruction).

8. Notice of Breach.

Receiving Party shall notify the Disclosing Party immediately upon discovery of any unauthorized use or disclosure of Confidential Information by Receiving Party or its Representatives, or any other breach of this Agreement by Receiving Party or its Representatives, and will cooperate with efforts by the Disclosing Party to help the Disclosing Party regain possession of Confidential Information and prevent its further unauthorized use.

9. No Binding Agreement for Transaction.

The parties agree that neither party will be under any legal obligation of any kind whatsoever with respect to a Transaction by virtue of this Agreement, except for the matters specifically agreed to herein. The parties further acknowledge and agree that they each reserve the right, in their sole and absolute discretion, to reject any and all proposals and to terminate discussions and negotiations with respect to a Transaction at any time. This Agreement does not create a joint venture or partnership between the parties. If a Transaction goes forward, the non-disclosure provisions of any applicable transaction documents entered into between the parties (or their respective affiliates) for the Transaction shall supersede this Agreement. In the event such provision is not provided for in said transaction documents, this Agreement shall control.

10. Warranty.

Each party warrants that it has the right to make the disclosures under this Agreement. NO WARRANTIES ARE MADE BY EITHER PARTY UNDER THIS AGREEMENT WHATSOEVER. The parties acknowledge that although they shall each endeavor to include in the Confidential Information all information that they each believe relevant for the purpose of the evaluation of a Transaction, the parties understand that no representation or warranty as to the accuracy or completeness of the Confidential Information is being made by either party as the Disclosing Party. Further, neither party is under any obligation under this Agreement to disclose any Confidential Information it chooses not to disclose. Neither Party hereto shall have any liability to the other party or to the other party's Representatives resulting from any use of the Confidential Information except with respect to disclosure of such Confidential Information in violation of this Agreement.

11. Miscellaneous.

(a) This Agreement constitutes the entire understanding between the parties and supersedes any and all prior or contemporaneous understandings and agreements, whether oral or written, between the parties, with respect to the subject matter hereof. This Agreement can only be modified by a written amendment signed by the party against whom enforcement of such modification is sought.

(b) The validity, construction and performance of this Agreement shall be governed and construed in accordance with the laws of Wisconsin applicable to contracts made and to be wholly performed within such state, without giving effect to any conflict of laws provisions thereof. The Federal and state courts located in Wisconsin shall have sole and exclusive jurisdiction over any disputes arising under the terms of this Agreement. 5

(c) Any failure by either party to enforce the other party's strict performance of any provision of this Agreement will not constitute a waiver of its right to subsequently enforce such provision or any other provision of this Agreement.

(d) Although the restrictions contained in this Agreement are considered by the parties to be reasonable for the purpose of protecting the Confidential Information, if any such restriction is found by a court of competent jurisdiction to be unenforceable, such provision will be modified, rewritten or interpreted to include as much of its nature and scope as will render it enforceable. If it cannot be so modified, rewritten or interpreted to be enforceable in any respect, it will not be given effect, and the remainder of the Agreement will be enforced as if such provision was not included.

(e) Any notices or communications required or permitted to be given hereunder may be delivered by hand, deposited with a nationally recognized overnight carrier, electronic-mail, or mailed by certified mail, return receipt requested, postage prepaid, in each case, to the address of the other party first indicated above (or such other addressee as may be furnished by a party in accordance with this paragraph). All such notices or communications shall be deemed to have been given and received (a) in the case of personal delivery or electronic-mail, on the date of such delivery, (b) in the case of delivery by a nationally recognized overnight carrier, on the third business day following dispatch and (c) in the case of mailing, on the seventh business day following such mailing.

(f) This Agreement is personal in nature, and neither party may directly or indirectly assign or transfer it by operation of law or otherwise without the prior written consent of the other party, which consent will not be unreasonably withheld. All obligations contained in this Agreement shall extend to and be binding upon the parties to this Agreement and their respective successors, assigns and designees.

(g) The receipt of Confidential Information pursuant to this Agreement will not prevent or in any way limit either party from: (i) developing, making or marketing products or services that are or may be competitive with the products or services of the other; or (ii) providing products or services to others who compete with the other.

(h) Paragraph headings used in this Agreement are for reference only and shall not be used or relied upon in the interpretation of this Agreement.

IN WITNESS WHEREOF, the parties hereto have executed this Agreement as of the date first above written.

Disclosing Party Receiving Party

By _____ By _____

Name: _____ Name: _____
<PRINT> <PRINT>

Title: _____ Title: _____
<PRINT> <PRINT>

VENDOR INFORMATION SHEET

This form must be completed and submitted with bid response. It is intended to provide the County with information on the vendor's name and address and the specific persons who were responsible for preparation of the vendor's response. Each vendor must also designate a specific contact person who will be responsible for responding to the County if any clarification of the vendor's response should become necessary.

Vendor Name: _____

Vendor Address: _____

Phone Number: _____ FAX: _____

E-mail: _____

Vendor Response Prepared By: _____

Signature: _____

**Declaration of Commitment to Compliance with
Milwaukee County's Minimum Wage Provision**

Bid/RFP #: _____

In accordance with Chapter 111 of the Milwaukee County Code of General Ordinances, it is the policy of Milwaukee County that certain contractors, subcontractors, lessees and recipients of financial assistance doing business with the county shall pay employees performing part or full time work for the county a minimum wage rate. The current required minimum wage rate is as follows:

Effective Date	Base Wage Required (\$ per hour)
June 1, 2015	\$11.66

Milwaukee County's Minimum Wage Ordinance generally applies to employers with more than 20 employees that entered into one of the following types of contracts or agreements as of June 1, 2014:

- Service Contracts under Chapter 32 of the Milwaukee County Code of General Ordinances
- Certain Personal Care/Supportive Home Care Services provided by agencies that contract exclusively with Milwaukee County
- Concession Contracts
- Lease Agreements
- Economic Development Financial Assistance Agreements

Exemptions to the policy are listed in section 111.03(2), Milwaukee County Ordinances.

In order to be considered responsive to the Bid/RFP, you must submit this form.

The undersigned hereby agrees to the following:

- To pay all workers employed by the Contractor in the performance of this contract, whether on a full time or part time basis, a base wage of not less than the minimum wage rate as determined annually by Milwaukee County.
- New rates that go into effect (annually on the last business day of February) will be adhered to promptly.
- To provide the Milwaukee County Office of the Comptroller-Audit Services Division a Declaration of Compliance and supporting payroll data every three (3) months during the contract term and within 10 days following the completion of the contract.
- To procure and submit a like Declaration and supporting payroll data from every subcontractor employed by the contractor.

I believe that I am exempt from Chapter 111 for the following reasons:

Please attach documentation to substantiate your claim of an exemption. Milwaukee County will review the documentation you provide; if your exemption is not substantiated, your proposal/bid will be deemed unresponsive, and will be removed from further consideration.

I declare under penalty of perjury that the forgoing is true and correct. I have read and understand Chapter 111 of the Milwaukee County Ordinances. I have executed this Declaration on _____ (date).

Company Name: _____

Authorized Signature: _____

Printed Name: _____

Insurance and Indemnity Acknowledgement Form

Vendor must at the time of the contract award provide to the County proof of all Liability clauses listed below:

Indemnity:

The parties agree to the fullest extent permitted by law, to indemnify, defend and hold harmless, the other party and its agents, officers and employees, from and against all loss or expenses including cost and attorney’s fees by reason of liability for damages including suits at law or in equity, caused by any wrongful, intentional, or negligent act or omission of the indemnifying party, or its (their) agent(s) which may arise out of or are connected with the activities covered by this Agreement. The County’s liability shall be limited by Wis. Stat. Section 893.80 for general liability.

The foregoing obligations are conditioned upon: (a) prompt written notice by the indemnified party to the indemnifying party of any claim, action or demand for which indemnity is claimed, provided however that the failure to give such notice shall not relieve the indemnifying party of its obligations hereunder except to the extent that such indemnifying party is materially prejudiced by such failure; (b) complete control of the defense and settlement thereof by the indemnifying party, provided that no settlement of an indemnified claim shall be made without the written consent of the indemnified party; and (c) reasonable cooperation by the indemnified party in the defense as the indemnifying party may request. The indemnified party shall have the right to participate in the defense against the indemnified claims with counsel of its choice at its own expense.

Insurance:

Contractor shall purchase and maintain policies of insurance and proof of financial responsibility to cover costs as may arise from claims of tort, statutes, and benefits under Workers' Compensation laws, as respects damage to persons or property and third parties in such coverages and amounts as required and approved by the County Director of Risk Management and Insurance. Acceptable proof of such coverages shall be furnished to the Director of Risk Management and Insurance prior to services commenced under this Contract.

It is understood and agreed that Contractor shall obtain information on the professional liability coverages of all sub-consultants and/or sub-contractors in the same form as specified above for review of the County.

Type of Coverage	Minimum Limits
Wisconsin Workers' Compensation	Statutory (Waiver of Subrogation for Workers Comp by Endorsement)
Employer's Liability	\$100,000/\$500,000/\$100,000

Commercial Or Comprehensive General Liability

General Aggregate	\$1,000,000 Per Occurrence
Bodily Injury & Property Damage	\$1,000,000 Aggregate
Personal Injury	\$1,000,000 Per Person
Contractual Liability	\$1,000,000 Per Occurrence
Fire Legal Liability	\$50,000 Per Occurrence

Professional Liability

Errors & Omissions	\$1,000,000 Per Occurrence
--------------------	----------------------------

Automobile Liability

Bodily Injury & Property Damage	\$1,000,000 Per Accident
---------------------------------	--------------------------

All Autos-Owned, non-owned

Uninsured Motorists

Per Wisconsin Requirements

Milwaukee County, as its interests may appear, shall be named as an additional insured for general, automobile, as respects the services provided in this Contract. Disclosure must be made of any non-standard or restrictive additional insured endorsement, and any use of non-standard or restrictive additional insured endorsement will not be acceptable. Notice of cancellation, nonrenewal, or material change shall be afforded to the county in accordance with the provisions of the policies.

The insurance specified above shall be placed with at least an A-/VIII rated carrier per Best's Rating Guide approved to do business in the State of Wisconsin. Any deviations or waiver of required coverages or minimums shall be submitted in writing and approved by the County Director of Risk Management and Insurance as a condition of this Contract. Waivers may be granted when surplus lines and specialty carriers are used.

A Certificate of Insurance shall be submitted for review to the County for each successive period of coverage for the duration of this Contract

Except for Worker's Compensation and Employers Liability, Milwaukee County shall be named as and Additional Insured in the general and automobile liability policies as its interests may appear as respects the services provided in this agreement. A waiver of subrogation shall be afforded to Milwaukee County on the Workers' Compensation policy. A thirty (30) day written notice of cancellation or non-renewal shall be afforded to Milwaukee County.

The insurance specified above shall be placed with an A rated carrier per Best's Rating Guide approved to do business in the State of Wisconsin. Any deviations or waiver of required coverages or minimums shall be submitted in writing and approved by Milwaukee County's Risk Manager as a condition of this agreement.

A certificate of insurance shall be submitted for review to Milwaukee County for each successive period of coverage for the duration of this agreement.

The undersigned certifies and represents an understanding of Milwaukee County’s Insurance and Indemnification requirements. The undersigned acknowledges that Milwaukee County is, in part, relying on the information contained in this proposal in order to evaluate and compare the response to the RFP.

Vendor’s Name

Title

Signature

Date

CONFLICT OF INTEREST STIPULATION

(Sign and Submit with Technical Proposal)

For purposes of determining any possible conflict of interest, all vendors submitting a proposal in response to this RFP must disclose if any Milwaukee County employee, agent or representative or an immediate family member is also an owner, corporate officer, employee, agent or representative of the business submitting the bid. This completed form must be submitted with the proposal. Furthermore, according to the Milwaukee County Code of Ethics, no person may offer to give to any County officer or employee or immediate family member, may solicit or receive anything of value pursuant to an understanding that such County representative's vote, official actions or judgment would be influenced thereby.

Please answer below either YES or NO to the question of whether any MC employee, agent or representative or immediate family member is involved with your company in any way:

YES _____

NO _____

IF THE ANSWER TO THE QUESTION ABOVE IS YES, THEN IDENTIFY THE NAME OF THE INDIVIDUAL, THE POSITION WITH MC, AND THE RELATIONSHIP TO YOUR BUSINESS:

NAME _____

COUNTY POSITION

BUSINESS RELATIONSHIP

THE APPROPRIATE CORPORATE REPRESENTATIVE MUST SIGN AND DATE BELOW:

PRINTED NAME _____

AUTHORIZED SIGNATURE _____

TITLE _____

DATE _____

SWORN STATEMENT OF BIDDER

(Sign and Submit with Technical Proposal)

I, being first duly sworn at _____,

City, State

On oath, depose and say I am the _____

Official Title

Of the Bidder, _____,

Name of Company

Do state the following: that I have fully and carefully examined the terms and conditions of this Request for Proposal, and prepared this submission directly and only from the RFP and including all accessory data. I attest to the facts that:

- I have reviewed the RFP, all related attachments, questions and answers, addenda, and information provided through MC, in detail before submitting this proposal.
- I have indicated review, understanding and acceptance of the RFP (or relevant service component being bid upon).
- I certify that all statements within this proposal are made on behalf of the Bidder identified above.
- I have full authority to make such statements and to submit this proposal as the duly recognized representative of the Bidder.
- I further stipulate that the said statements contained within this proposal are true and correct and this sworn statement is hereby made a part of the foregoing RFP response.

Signature

Legal Address

Subscribed and sworn to before me

This _____ day of _____, _____

Notary Public, _____ **County**

State of _____

My commission expires _____.

COVER SHEET FOR TECHNICAL PROPOSAL

(Sign and Submit with Technical Proposal)

In submitting and signing this proposal, we also certify that we have not, either directly or indirectly, entered into any agreement or participated in any collusion or otherwise taken any action in restraint of free trade or competition; that no attempt has been made to induce any other person or firm to submit or not to submit a proposal; that this proposal has been independently arrived at without collusion with any other vendor, competitor, or potential competitor; that this proposal has not knowingly been disclosed prior to the opening of the proposals to any other vendor or competitor; that the above statement is accurate under penalty of perjury.

In submitting and signing this proposal, we represent that we have thoroughly read and reviewed this Request for Proposal and are submitting this response in good faith. We understand the requirements of the program and have provided the required information listed within the Request for Proposal.

The undersigned certifies and represents that all data, pricing, representations, and other information of any sort or type, contained in this response, is true, complete, accurate, and correct. Further, the undersigned acknowledges that Milwaukee County is, in part, relying on the information contained in this proposal in order to evaluate and compare the responses to the RFP for Professional Services

Vendor's Name

Title

Signature

Date

COVER SHEET FOR PRICING PROPOSAL

(Sign and Submit with Price Proposal)

In submitting and signing this proposal, we also certify that we have not, either directly or indirectly, entered into any agreement or participated in any collusion or otherwise taken any action in restraint of free trade or competition; that no attempt has been made to induce any other person or firm to submit or not to submit a proposal; that this proposal has been independently arrived at without collusion with any other vendor, competitor, or potential competitor; that this proposal has not knowingly been disclosed prior to the opening of the proposals to any other vendor or competitor; that the above statement is accurate under penalty of perjury.

In submitting and signing this proposal, we represent that we have thoroughly read and reviewed this Request for Proposal and are submitting this response in good faith. We understand the requirements of the program and have provided the required information listed within the Request for Proposal.

The undersigned certifies and represents that all data, pricing, representations, and other information, of any sort or type, contained in this response, is true, complete, accurate, and correct. Further, the undersigned acknowledges that Milwaukee County is, in part, relying on the information contained in this proposal in order to evaluate and compare the response to the RFP for Professional Services

Vendor's Name

Title

Signature

Date

EEOC COMPLIANCE

(Sign and Submit with Technical Proposal)

YEAR 2015 EQUAL EMPLOYMENT OPPORTUNITY CERTIFICATE FOR MILWAUKEE COUNTY CONTRACTS TO BE COMPLETED AND SIGNED BY ALL APPLICANTS

In accordance with Section 56.17 of the Milwaukee County General Ordinances and Title 41 of the Code of Federal Regulations, Chapter 60, SELLER or SUCCESSFUL PROPOSER or CONTRACTOR or LESSEE or (Other-specify), (Hence forth referred to as CONTRACTOR) certifies to Milwaukee County as to the following and agrees that the terms of this certificate are hereby incorporated by reference into any contract awarded.

Non-Discrimination

CONTRACTOR certifies that it will not discriminate against any employee or applicant for employment because of race, color, national origin, sex, age or handicap which includes but is not limited to the following: employment, upgrading, demotion or transfer, recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training including apprenticeship.

CONTRACTOR will post in conspicuous places, available to its employees, notices to be provided by the County setting forth the provision of the non-discriminatory clause.

A violation of this provision shall be sufficient cause for the County to terminate the contract without liability for the uncompleted portion or for any materials or services purchased or paid for by the contractor for use in completing the contract.

Affirmative Action Program

CONTRACTOR certifies that it will strive to implement the principles of equal employment opportunity through an effective affirmative action program, which shall have as its objective to increase the utilization of women, minorities, and handicapped persons and other protected groups, at all levels of employment in all divisions of the seller's work force, where these groups may have been previously under-utilized and under-represented.

CONTRACTOR also agrees that in the event of any dispute as to compliance with the foretasted requirements, it shall be his responsibility to show that he has met all such requirements.

Non-Segregated Facilities

CONTRACTOR certifies that it does not and will not maintain or provide for its employees any segregated facilities at any of its establishments, and that it does not permit its employees to perform their services at any location under its control, where segregated facilities are maintained.

Subcontractors

CONTRACTOR certifies that it has obtained or will obtain certifications regarding non-discrimination, affirmative action program and non-segregated facilities from proposed

subcontractors that are directly related to any contracts with Milwaukee County, if any, prior to the award of any subcontracts, and that it will retain such certifications in its files.

Reporting Requirement

Where applicable, CONTRACTOR certifies that it will comply with all reporting requirements and procedures established in Title 41 Code of Federal Regulations, Chapter 60.

Affirmative Action Plan

CONTRACTOR certifies that, if it has 50 or more employees, it will develop and/or update and submit (within 120 days of contract award) an Affirmative Action Plan to: Audit Compliance Manager, Milwaukee County Department of Audit, 2711 West Wells Street, Milwaukee, WI 53208 [Telephone No.: (414) 278-4206]. CONTRACTOR certifies that, if it has 50 or more employees, it has filed or will develop and submit (within 120 days of contract award) for each of its establishments a written affirmative action plan. Current Affirmative Action plans, if required, must be filed with any of the following:

The Office of Federal Contract Compliance Programs or the State of Wisconsin, or the Milwaukee County Department of Audit, 2711 West Wells Street, Milwaukee, WI 53208 [Telephone No.: (414) 278-4206].

If a current plan, has been filed indicate where filed _____ and the year covered_____.

CONTRACTOR will also require its lower-tier subcontractors who have 50 or more employees to establish similar written affirmative action plans.

Employees

CONTRACTOR certifies that it has (No. of Employees) _____employees in the Standard Metropolitan Statistical Area (Counties of Milwaukee, Waukesha, Ozaukee and Washington, Wisconsin) and (No. of Employees) _____employees in total.

Compliance

CONTRACTOR certifies that it is not currently in receipt of any outstanding letters of deficiencies, show cause, probable cause, or other notification of noncompliance with EEOC regulations.

Executed this _day of _____, 20__ by:

Firm Name _____

By _____

Title _____

Address _____

City/State/Zip _____

**CERTIFICATION REGARDING
DEBARMENT AND SUSPENSION**
(Sign and Submit with Technical Proposal)

The applicant certifies to the best of its knowledge and belief, that its' principals, owners, officers, shareholders, key employees, directors and member partners: (1) are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency; (2) have not within a three-year period preceding this proposal been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property; (3) are not presently indicted for or otherwise criminally charged by a governmental entity (Federal, State or local) with commission of any of the offenses enumerated in (2) of this certification; and, (4) have not within a three-year period preceding this proposal had one or more public transactions (Federal, State or local) terminated for cause or default.

Authorized Signature: _____ Date: _____

Printed Name: _____ Title: _____

Company: _____

**PROPRIETARY INFORMATION DISCLOSURE FORM
(Sign and Submit with Technical Proposal)**

The attached material submitted in response to the Request for Proposal includes proprietary and confidential information, which qualifies as a trade secret, as provided in s. 19.36(5), Wis. Stats. or is otherwise material that can be kept confidential under the Wisconsin Open Records Law. As such, we ask that certain pages, as indicated below, of this proposal response be treated as confidential material and not be released without our written approval.

Prices always become public information and therefore cannot be kept confidential.

Other information cannot be kept confidential unless it is a trade secret. Trade secret is defined in s. 134.90(1)(c). Wis. Stats. as follows: "Trade Secret" means information, including a formula, pattern, compilation, program, device, method, technique or process to which all of the following apply:

1. The information derives independent economic value, actual or potential, from not being generally known to, and not being readily ascertainable by proper means by, other persons who can obtain economic value from its disclosure or use.
2. The information is the subject of efforts to maintain its secrecy that are reasonable under the circumstances.

We request that the following pages not be released:

Section	Page #	Topic

IN THE EVENT THE DESIGNATION OF CONFIDENTIALITY OF THIS INFORMATION IS CHALLENGED, THE UNDERSIGNED HERBY AGREES TO PROVIDE LEGAL COUNSEL OR OTHER NECESSARY ASSISTANCE TO DEFEND THE DESIGNATION OF CONFIDENTIALITY AND AGREES TO HOLD MILWAUKEE COUNTY HARMLESS FOR ANY COSTS OR DAMAGES ARISING OUT OF MILWAUKEE COUNTY'S AGREEMENT TO WITHHOLD THE MATERIALS.

Failure to include this form in the Request for Proposal may mean that all information provided as part of the proposal response will be open to examination and copying. Milwaukee County considers other markings of confidential in the proposal document to be insufficient. The undersigned agrees to hold Milwaukee County harmless for any damages arising out of the release of any materials unless they are specifically identified above.

Company Name _____

Authorized Representative _____
Signature

Authorized Representative _____

Type or Print _____
Date _____

DISADVANTAGED BUSINESS ENTERPRISE FORMS

**Attachment C
Northwoods' DRAFT Statement of Work**

Statement of Work has not been finalized, and will be provided following the Discovery Phase of this Agreement. The following information is provided for reference regarding expected hours required to complete the project and an overview of proposed milestones. A finalized, executed Statement of Work will be included on completion as Exhibit E.

Name	Position	Estimated Hours
Patty Clemens	Account Director	150
Eric White	Senior Developer	300
Rachel Carter	Digital Strategy/Branding	50
Amanda Koehler	Digital Strategy/Branding	50
Jim Brophy	Digital Strategy/Branding	40
Sydney Shimko	Senior Creative Designer	269
Ondrej Zoltan	Deployment	120
Pam Zimmerman	Testing	160
DBE Partner, Prism Technologies	Content and Training	200
	TOTAL HOURS	1339

Milestones

1. 30% (\$58,247) Down Payment Upon Completion of Digital Strategy / Requirements' Kickoff
2. 20% (\$38,831) Payment Upon Completion of Branding, Digital Strategy & Requirements phase
3. 20% (\$38,831) Payment Upon Completion of Upgrade of the Milwaukee County Titan Instance to V6.7 in Development, Test and Production environments
4. 20% (\$38,831) Payment Upon Completion of Design Phase
5. 10% (\$19,415) Payment Upon Delivery of Updates to Support New Portal, Intranet and Department Sites in Milwaukee County's Test environment

Attachment D
Northwood's Proposal Response to County RFP



NORTHWOODS WEB SOLUTIONS

TECHNICAL PROPOSAL REQUIREMENTS

MILWAUKEE COUNTY RFP # 98150016

COUNTY-WIDE BRANDING, WEBSITE DESIGN & DEVELOPMENT

Prepared by:

Tom Pappas
Business Development

Phone Number: 414-914-9143
Support Line: 414-914-9300

January 8, 2016

CONTENTS

Executive Summary.....	8
8. Technical Proposal Requirements.....	10
9.1 PROJECTS OF RELEVANT EXPERIENCE	10
9.1.1 It is required that within the last two years at least three sites have been designed by the selected agency. Describe those three sites and provide client contacts.	10
9.1.2 The selected agency will perform test code in a range of browser and mobile platforms and do beta testing and Q & A. Describe your experience in those areas.	13
9.1.3 The selected agency will work in partnership with the Milwaukee County team to drive this project. Describe your practices and experience working with government entities.	14
Also describe your experience in working with large, complex clients.	14
9.1.4 Describe your experience and expertise creating websites that adhere to ADA best practices.....	15
9.2 Organizational Capabilities	16
9.2.1 How long your agency has been providing services requested in this RFP?	16
9.2.2 How many staff are currently employed to manage the services requested in this RFP?	16
9.2.3 What new accounts have been added to your roster in the last three years?	18
9.2.4 What accounts have been lost from your roster in the last three years? Why?	18
9.2.5 Provide your organization’s total billings for years 2012, 2013, 2014.	18
9.2.6 Provide a list of clients for whom the agency had primary responsibility for branding as well as developing and designing a website.....	19
9.3 Your Story	19
9.3.1 Briefly share your agency’s story and include background/biographies on the proposed team for this work.	19
9.4 Scope Requirements.....	23
9.4.1 Website and Creative Design.....	23
9.4.1.1 Describe your planning and creative process from beginning to final execution, including:.....	23

Your organization’s planning process for website design	23
Strategic and long term planning.....	26
Communication process with the client	26
9.4.1.2 Provide the URL for two websites of similar scope to www.county.milwaukee.gov that your organization has designed, and include a one-page single-spaced description for each URL that details the following:	26
URL Example #1.....	26
Client Background	26
Client contact information	27
Website user profile.....	27
Reasoning for navigation and design	27
Successful features, functionality and design elements implemented to enhance the user experience	27
How you integrated the brand into the design	28
URL Example #2.....	30
Client Background	30
Client contact information	30
Website user profile.....	30
Reasoning for navigation and design	30
Successful features, functionality and design elements implemented to enhance the user experience	31
How you integrated the brand into the design	31
9.4.1.3 Describe one other government-focused web design project that your organization successfully completed.	33
9.4.2 Branding.....	34
9.4.2.1 Describe the process your agency uses to create a brand foundation that allows an organization to meet its marketing objectives? What are the deliverables?	34

9.4.2.2 Provide two branding examples of work similar to the requirements outlined in this RFP. Include client contact information for each example.36

9.5 Project Approach41

9.5.1 Goal Measurement.....41

9.5.1.1 Explain how you measure success. Provide specific examples.....41

9.5.2 Project Management.....42

9.5.2.1 Explain the following in regard to project management. Provide supporting documentation as appropriate:42

Overall approach to project management including methods, tools and strategies42

Progress reporting process45

Issues Tracking (CMS maintenance / bug tracking)45

Quality controls.....45

9.6 Innovation.....46

9.6.1 Explain how your organization addresses these digital trends in your design work:.....46

Provide specific examples for:46

Mobile and tablet.....46

Content personalization.....46

User interface design46

9.7 Digital Marketing46

9.7.1 Explain your approach to developing a search engine optimization strategy and recommendations for a website similar in scope and complexity to the County’s site. Provide specific examples.46

9.8 Subcontracting.....48

9.8.1 Describe those aspects or parts of work that shall be performed by staff of your organization and those aspects or parts of the work that shall be subcontracted.48

9.8.2 Explain the reasons for the in-house performance of those aspects or parts of the work you anticipate shall be performed in-house and explain the reasons for the anticipated performance of the remaining aspects or parts of the work to be performed by subcontractors.....49

9.8.3 Describe what you believe to be the advantages or disadvantages of using subcontractors.....49

9.9 Technical Innovations50

9.9.1 Describe how your organization has kept up with technology during the past three years in the areas of:
.....50

CMS platforms.....50

Website/data security.....50

Site search51

Search Engine Optimization51

Audio/Video delivery52

Mapping technologies.....53

User-customized content and widgets53

Data and/or content applications54

Mobile/wireless technologies.....54

Service orientated architecture54

Separation in content and display logic.....55

Security55

eCommerce and payments56

Social Media Integration56

ADA Best Practices57

9.9.2 Describe how you identify and evaluate the effectiveness and applicability of emerging technologies to meet client needs.....57

9.9.3 Describe how the company provides strategic direction on implementing new technology. **Provide implemented examples, including text, screen shots and links.**.....58

9.10 Database Design and Management.....63

9.10.1 Describe and provide examples of your organization’s experience in the.....63

following:	63
Legacy data conversion.....	63
Data Schema. Include information on both the creation of data schema and the evaluation of existing schema in order to recommend changes for efficiencies.	63
Management of large databases that support a website. Include an overview of the complexity of the site supported by the database and the number of records managed.....	67
9.10.2 Describe (not more than 2 pages) your best example of a CMS or database design project of similar scope, indicating how you addressed the following:.....	68
Admin UX design	68
User Profile management- administrative and various levels of roles and responsibilities.....	68
SEO considerations	69
Inline editing	69
Imagery and multimedia.....	70
Flexibility to mine fields that are customizable	70
Archiving data	71
Document tree management	71
Caching/load balancing.....	71
Scalability – administrative, functional, load and generation	72
Speed/load times in the CMS.....	72
Data migration / exporting of data	72
9.11 Web Application Development	73
9.11.1 Provide URL's or screen shots of your two best examples and a one page single- spaced description for each URL or screen shot of how your organization approaches its work as it pertains to web application development for the following:	73
Existing web properties that incorporate CMS.....	73
Extranets	76

Facts.....76

Results77

 9.11.2 In your description, address the strategy, technologies, methodologies and approach to prioritization of tasks, staff assignments, tracking, status updates and training as they pertain to maintaining and advancing web properties.....79

9.12 References83

 9.12.1 Provide three references of clients for whom the agency has performed branding, website development and design, and the services requested in this RFP.....83

 Reference #183

 Reference #283

 Reference #383

EXECUTIVE SUMMARY

For more than a decade, Northwoods has been a close partner and trusted business advisor to Milwaukee County. Northwoods has provided consistent, focused, and high quality consulting and professional services of varied kinds to the IMSD staff.

The partnership with Northwoods has been good, and a continued team effort to accomplish soon to be succinctly defined web goals is optimistically warranted.

Northwoods is cognizant of the Project Scope and Objectives and is highly qualified to efficiently and effectively provide, Key Project Activities and Deliverables, Design Needs, Digital Marketing, and Implementation and Support, as detailed in the *County-wide Branding, Website Design & Development* RFP document (#98150016).

Northwoods is extremely motivated to submit this document. While the public website and Intranet we mutually launched a decade or so ago was cutting edge and the portal received awards for intergovernmental cooperation, it is time to get down to the serious business of once again providing citizens, employees, and visitors a newly designed web presence; one that drives home the County's positive atmosphere and offerings, attentive public services, and robust growing business environment.

The County currently utilizes the Titan LDAP Authentication features which allow County staff to use their County Active Directory account to access the Titan CMS hosted Intranet. Having this infrastructure already in place in Titan CMS provides a significant cost savings and physical head start in adding personalization and integrating other County resources working off the same Active Directory account.

In addition, Milwaukee City also utilizes the Titan CMS LDAP Authentication feature which provides a bridge between the City and County allowing content to be shared securely between one another.

We strongly recommend starting this Project with a Digital Strategy and Branding Review. It is important to look at the existing site usage to ensure you keep and add features that your end-users conveniently depend on and you eliminate or replace features that present them with roadblocks.

On completion of the Review, we will have the necessary information to create blueprints for a new, improved website image and Information Architecture that provides your end users with the information and features they expect and desire. Given these blueprints, Northwoods is prepared to help Milwaukee County prioritize and phase in the needs and wants as budget and necessity present themselves.

By implementing the new websites on the County's existing Titan CMS platform, resources allocated to the website redesign can be focused on building-out the information architecture, functionality, content, and ascetics the County wishes to present end users. This is another clear cost savings and physical advantage over allocating



the resources to the hosting infrastructure, user training, and content migration required to rebuild the websites on an alternate CMS platform.

Northwoods is confident that Titan CMS measures up to any other content management system on the market today and is an ideal platform for hosting both the County's public facing websites and Intranet website.

In addition, the modular architecture of the Titan CMS combined with our highly capable development services group ensures our customers are never put into a position where they cannot provide functionality their end users require.

The document below provides a succinct response to the Technical Proposal Requirements as requested.

All of us at Northwoods look forward to being involved in this endeavor. The prospect of being able to continue serving Milwaukee County is very motivating. Thanks again for the opportunity.

8. TECHNICAL PROPOSAL REQUIREMENTS

9.1 PROJECTS OF RELEVANT EXPERIENCE

9.1.1 IT IS REQUIRED THAT WITHIN THE LAST TWO YEARS AT LEAST THREE SITES HAVE BEEN DESIGNED BY THE SELECTED AGENCY. DESCRIBE THOSE THREE SITES AND PROVIDE CLIENT CONTACTS.

Milwaukee Public Schools

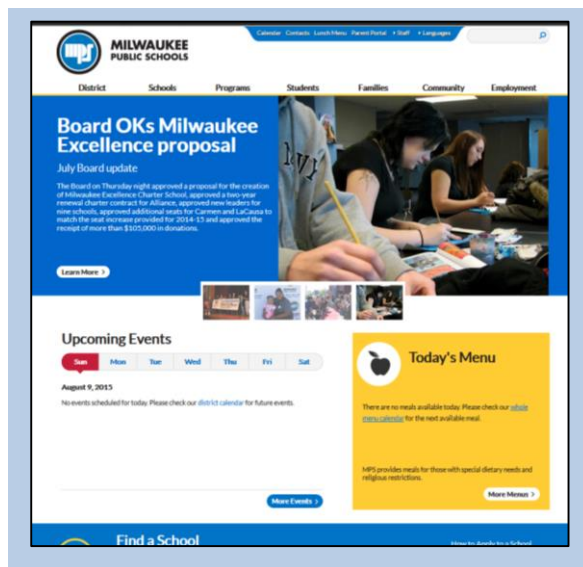
Milwaukee Public Schools (MPS) is the largest school district in Wisconsin serving more than 78,000 students in 160 schools in the 2014-2015 school year. MPS offerings include neighborhood schools, specialty schools and charter schools serving students as young as age three (3) through grade 12. MPS also has about 9,500 full-time equivalent (FTE) staff positions.

Northwoods was retained to design, develop, and implement new, innovative, responsively designed district websites for public and internal audiences. Some of Northwoods' process included:

- Formulating and prioritizing final scope and timelines
- Defining potential project risks and related contingency plans
- Conducting content inventory for all MPS websites
- Developing draft and final site maps
- Preparing for and facilitating focus groups with principals, teachers, students and parents, as well as department heads and leaders
- Developing wireframes and comprehensive layouts
- Prototyping responsive website design composites
- Testing design within browsers and devices
- Quality assurance testing with various audience types
- Super-users training for webmaster using Titan CMS
- Implementing Titan CMS on Production Server
- Attentive and consistent support during and after launch

Contact: Amy Kant, Webmaster, Department of Communications and Outreach, Milwaukee Public Schools

Phone: 414-475-8902 Email: kantam@milwaukee.k12.wi.us



Wisconsin Dells Visitors and Convention Bureau

The Wisconsin Dells Visitor & Convention Bureau (WDV&CB) is the official tourism destination marketing organization for the Wisconsin Dells/Lake Delton area. The website receives approximately 1.8 million unique visitors annually.

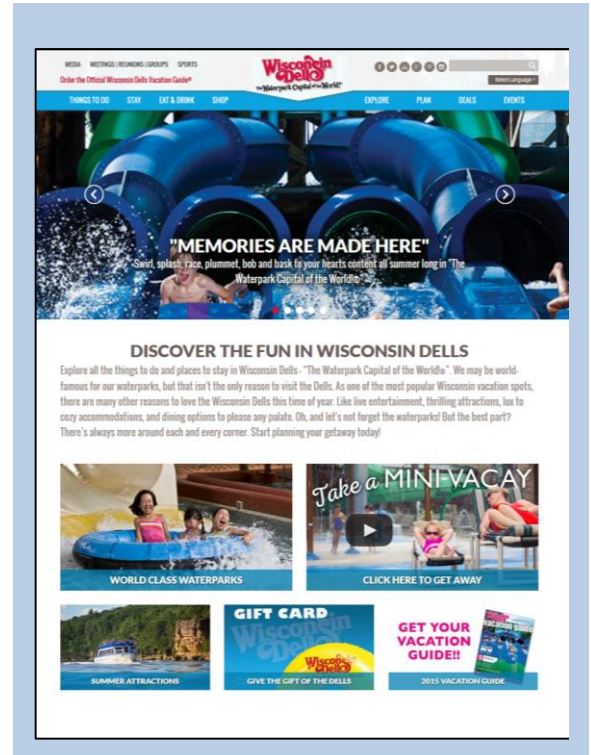
The WDV&CB needed a new website platform to enhance and streamline the Bureau's information and news distribution; extranet capabilities to meet the needs of members and the media; robust, modern, and easy to use content management system to disseminate information; new digital strategy and information architecture to handle increased content and additional features in the website and a SEO strategy aimed at maintaining top search engine results.

Northwoods was brought in to enable the WDV&CB to realize these goals by delivering, on budget and on time, a new website built on the Titan CMS platform and migrating and preservation of existing data and content to the new platform.

The new responsive site features: 465 documents in four websites including a desktop version of the website, two extranets, support for more than 2,600 multimedia files, 2,500+ records contained within 12 Titan CMS data sites, real time integration to maintain member information, and consolidated member information (this view of "Bureau Members" provides more listing value to its membership base).

Northwoods also preserved search engine indexes, content images and meta-data to help sustain the prior SEO efforts of the WDV&CB.

Contact: Sarah Hudzinski, Dir of Marketing & Communications, Wisconsin Dells Visitor & Conventions Bureau
Phone: 608-254-8088 Email: sarah@wisdells.com



United Way of Greater Milwaukee and Waukesha County

United Way of Greater Milwaukee is an independently-governed nonprofit organization connected to a network of more than 1,400 local United Ways through United Way Worldwide. They have their own board of directors and focus their work on local solutions for local problems.

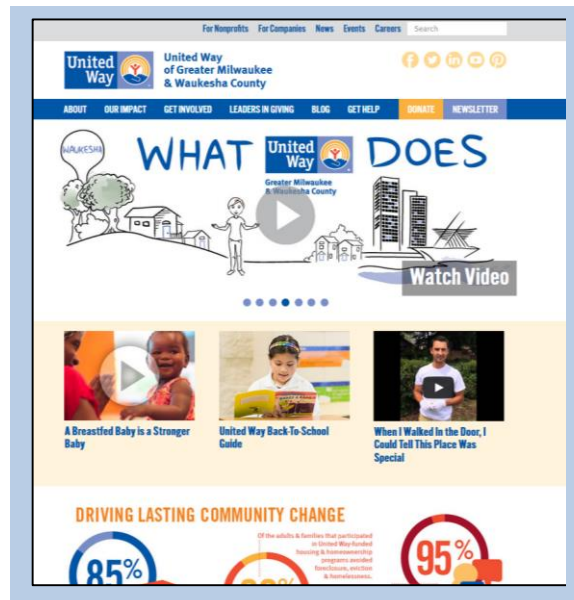
United Way of Greater Milwaukee needed to streamline their websites into a single technology and management approach. This included a joint venture with the SERVE Group to build a supporting website for the Baby Can Wait campaign, as well as a redesign of the United Way primary website.

Using Titan CMS, Northwoods built a website infrastructure for United Way so they could support the content needs of their website and quickly and efficiently build new websites with little technical assistance. United Way is able to quickly update and manage all aspects of their main website, build new websites to support campaigns and connect to social channels.

In 2015, United Way of Greater Milwaukee merged with United Way of Waukesha County. They redesigned their website to incorporate the new information from Waukesha County. The new website was configured to focus on storytelling blogs about United Way as well as a new database to manage information of all of the member organizations.

By focusing on storytelling, United Way increased user engagement by 10% and newsletter conversions by 227%!

Contact: Laura Meine, eBusiness Administrator, United Way of Greater Milwaukee & Waukesha County
Phone: 414-263-8178 Email: lmeine@unitedwaygmwc.org



9.1.2 THE SELECTED AGENCY WILL PERFORM TEST CODE IN A RANGE OF BROWSER AND MOBILE PLATFORMS AND DO BETA TESTING AND Q & A. DESCRIBE YOUR EXPERIENCE IN THOSE AREAS.

Testing for Desktop, Responsive, and Mobile Aware in our Northwoods Device Testing Lab

Northwoods will complete browser, OS and device testing as described below. We will test the new website on the browsers, operating systems (OS), and devices listed below for display consistency and make best efforts to remedy issues within the hours allocated.*

Browser/Version	OS	Device
Internet Explorer (Latest release)	Window 7, Windows 8.1	Desktop Microsoft Surface Windows Phone
Edge (Latest release)	Windows 10	Desktop Microsoft Surface Windows Phone
IE 9 and IE 10	Windows 7	Desktop
Google Chrome (Latest release)	Window 7, Windows 8 Android 4.0 (Smart Phone) OS X (10.9 or greater)	Desktop Tablet Smart Phone
Mozilla Firefox (Latest release)	Window 7, Windows 8 Android 4.0 (Smart Phone) OS X (10.9 or greater)	Desktop Tablet Smart Phone
Apple Safari (Latest release)	iOS 8.1 (Phone, iPad) OS X (10.9 or greater)	iPad 3, 4, Air, Mini iPhone 4,5,6 Mac Desktop

*Note: The identification and elimination of all display anomalies that may occur in the various combinations of browsers, operating systems, and devices is not achievable within the time and budget allocated given the existence of more than a thousand combinations of browser versions, OS versions, service packs, hot fixes, browser plugins, and known and unknown browser bugs.

We work to identify and eliminate as many display anomalies as possible for the combinations listed above, but do not in any way guarantee or imply that all issues can or will be solved.

If display anomalies are discovered after the hours allocated for Front End Development have been exhausted, or during the warranty period, Northwoods will provide services to remedy the issue(s), if possible, using our best efforts, at our normal hourly rates for Front End Development services as applicable.

9.1.3 THE SELECTED AGENCY WILL WORK IN PARTNERSHIP WITH THE MILWAUKEE COUNTY TEAM TO DRIVE THIS PROJECT. DESCRIBE YOUR PRACTICES AND EXPERIENCE WORKING WITH GOVERNMENT ENTITIES.

Northwoods has had the distinct honor of being an instrumental part of the joint relationship between the County and City of Milwaukee.

In 2004, Milwaukee County selected Northwoods to convert existing websites into one consolidated website. Titan CMS was used as the central platform for the consolidated websites. Soon after, the Milwaukee County intranet was moved to the Titan CMS platform, as well.

In addition, at the same time, Northwoods executed a similar project with the City of Milwaukee to convert the City websites and intranet into Titan CMS.

While working with the City and the County independently on their respective Titan CMS projects, all parties expressed an interest in the idea of collaboration between the City and the County. Northwoods scheduled a meeting with both the City and the County to discuss potential collaboration opportunities. There were two meetings with the City and the County to discuss collaboration. Both meetings were open forum discussions where collaboration ideas were freely shared among all in attendance. The resulting creation of a Joint Web Portal sharing one enterprise instance of Titan CMS was recognized by the Public Policy Forum in 2005 in a Salute to Local Governments Award for Intergovernmental Cooperation.

Additionally, the cost savings from the joint Titan CMS effort allowed the County and City to expand and enhance the site to include many other online processes.

Northwoods has been a trusted business and technology provider the County and City for many years and has the deep knowledge to continue supporting and enhancing the publics' web experience in a cost efficient manner.

Northwoods Software has also had the privilege of work with other non-profit and government agencies for many years, some of which include including The City of Franklin, The City of Milwaukee Employee Retirement System, City of Milwaukee Public Works, Milwaukee Metropolitan Sewerage District, Southeast Wisconsin Regional Planning Commission (SEWRPC), Racine/Kenosha Community Action Agency, the State of Wisconsin's WHEDA, and the Wisconsin Policy Research Institute.

ALSO DESCRIBE YOUR EXPERIENCE IN WORKING WITH LARGE, COMPLEX CLIENTS.

We have worked, and continue to work with large, complex public and private corporations and organizations across a wide spectrum of industries and sectors. The success of these engagements has been achieved through quality requirements definition, clearly defined roles and responsibilities and excellent project management and process.

For the duration of a large and more complex project, Northwoods will assign an Account Director to the project with the responsibility for overall project coordination and communication. Project management ensures that

everyone on the project knows what is expected of them and helps to keep cost, time and risk under control. Experience has shown that all projects are inherently at risk. Good project management prevents problems before they occur by:

- Consulting with and gaining ownership and support from departments and stakeholders
- Developing detailed requirements and measurable goals with clear visual assets to aid understanding
- Finding skilled and experienced resources
- Developing good reporting arrangements and decision-making discipline
- Developing good understanding of required project activities, roles and responsibilities
- Maintaining well-defined scope and active management of risks, issues, and decision-making
- Providing day-to-day oversight of all project activities
- Scheduling and coordinating client communications and internal/joint status meetings
- Performing administrative, reporting, and other tasks

9.1.4 DESCRIBE YOUR EXPERIENCE AND EXPERTISE CREATING WEBSITES THAT ADHERE TO ADA BEST PRACTICES.

Northwoods has had experience developing and remediating sites that were not ADA compliant. Most recently, best practices were applied to the Milwaukee Public Schools sites, focusing on the fundamentals of sound ADA design and development. Guiding principles include:

- Providing contrast between page backgrounds and text
- Using larger font sizes
- Adding keyboard access, control and shortcuts
 - The ability to tab through a site so a mouse is not required
- Ensuring the site is compatible with screen reading software, such as JAWS
- Easily scannable with simple to use and understand page layouts
- Going beyond simple color considerations and integrating shapes to convey information

Two other example clients where ADA practices have been implemented include ManpowerGroup and Experis

9.2 ORGANIZATIONAL CAPABILITIES

9.2.1 HOW LONG YOUR AGENCY HAS BEEN PROVIDING SERVICES REQUESTED IN THIS RFP?

18 years

9.2.2 HOW MANY STAFF ARE CURRENTLY EMPLOYED TO MANAGE THE SERVICES REQUESTED IN THIS RFP?

Northwoods has a total of 46 employees; six of which are Account Directors / Project Managers.

Depending on the role, a variety of staff will be engaged with the County during and after this project.

Every one of our clients is assigned one Business Development Manager and one Account Director. The Account Director is involved during the RFP process and will accompany you throughout the project, and beyond. Our Account Directors are competent in a wide range of services including:

NORTHWOODS' ACCOUNT DIRECTOR

- SEO best practices
- Conversion strategies
- Social media strategy
- Titan CMS implementation
- Usability consulting
- Wireframing services
- Data product taxonomy
- Product merchandising
- Catalog configuration
- Project Management
- Be the main point of contact for Milwaukee County
- Schedule all internal and external project meetings & tasks
- Develop a communication plan with Milwaukee County
- Maintain the project budget and timeline & communicate any deviations
- Performs the overall day to day management of the project to ensure that project objectives are achieved within time/cost/quality constraints, while managing stakeholder expectations

NORTHWOODS' BUSINESS DEVELOPMENT MANAGER

- Manages overall relationship and contractual efforts
- Clearly communicate project expectations to the NWS Project Manager
- Provide any additional cost estimates (out of scope or additional phase work) to Milwaukee County
- Be available to Milwaukee County to escalate concerns, if necessary

NORTHWOODS' SENIOR DIGITAL MARKETING STRATEGISTS

- Implement and manage specific digital strategies during the website strategy and design
- Offer content authoring and migration services

- Provide search engine results page optimization, analytics set-up, and content optimization during deployment
- Deliver on-going digital marketing services post launch to optimize website(s) performance

NORTHWOODS' CREATIVE TEAM

- Under direction of Northwoods' Account Director, Front-end Designers and Programmers provide the expertise for the user experience
- One to three will be assigned

NORTHWOODS' DEVELOPMENT TEAM

- With Northwoods' Project Manager guidance, lead the Development/Deployment
- Provide programming and specifications for any dynamic pages and database considerations

NORTHWOODS' TESTING AND LAUNCH TEAMS

- Perform all regression and unit testing of the new website
- Provide recommendations and technical support regarding hosting
- Support the go-live launch event and post launch support

NORTHWOODS' SUPPORT TEAMS

- Provide phone and email support to Milwaukee County designated staff regarding Titan CMS, databases, design, and hosting questions

9.2.3 WHAT NEW ACCOUNTS HAVE BEEN ADDED TO YOUR ROSTER IN THE LAST THREE YEARS?

Sixteenth Street Community Health Centers
3D Molecular Designs
Advanced Detection Systems
Alfa Tools
American Fraternal Alliance
AO Smith
Associated Solutions
Autism Behavioral Network
Busch Precision
Citizens Bank of Mukwonago
CIVCO Medical Solutions
Conflex
Curative Care Network
Data Specialists, Inc.
Desert Aire
DHI Corporation
Dings Company
Dispense-Rite
EMTEQ
The Flex Company
Godfrey & Kahn
Grayhill
Guardian Software
Hemostasis & Thrombosis Research Society, Inc.

Hydrite Chemical Company
Leeson Electric
MagnaFlux
Matenaer Corp
International Parkinson and Movement Disorder Society
National Fluid Power Association
New York Blower
Nicholas Company
Northwestern Mutual
Poclain Hydraulics, Inc.
Regal Beloit Corporation
Securant Bank and Trust
Service Wire
SET Ministry
SKYGEN USA
Tempco Electric Heater Corporation
TherAdapt
U-Mark Corporation
Weimer Bearing
Wisconsin Breast Cancer Show House - MCW
Wisconsin Dells Visitor and Convention Bureau
Wisconsin Policy Research Institute
YMCA of Greater Waukesha County

9.2.4 WHAT ACCOUNTS HAVE BEEN LOST FROM YOUR ROSTER IN THE LAST THREE YEARS? WHY?

- Ansary and Associates: The firm went with the CMS solution recommended by the designer of their new website
- BizStarts Milwaukee: Change in leadership scaled back content including resource directory. New website did not need a robust CMS to handle their scaled back website
- Kolb & Co: Firm was acquired by a larger firm and the old website was taken down
- MCSC: Small nonprofit decided to go with a much smaller website than originally envisioned
- MTEA: Milwaukee Chapter of WEAC was consolidated into the statewide teachers union, thus a local website was no longer required
- Brewer Company: The new marketing director wanted to move to the platform he was more familiar with
- Catholic Charities: Moved to the web platform closely integrated with their fundraising software
- Dohmen Group: The enterprise intranet we built was not needed after divestiture of some business units
- Joy Global: IT department decided to build a custom CMS
- Phoenix Products: Created their new website on an alternative CMS recommended by internal designer
- Spacesaver: Merger with a much larger company required move to that corporate platform

9.2.5 PROVIDE YOUR ORGANIZATION'S TOTAL BILLINGS FOR YEARS 2012, 2013, 2014.

As a privately held company, we typically do not provide our financial information. However, you may contact our banker for additional insight to our financial health.

Jon Willems, Vice President
Commerce State Bank
1700 South Silverbrook Drive
West Bend, WI 53095
P: 262-247-2844
C: 262-225-8177



9.2.6 PROVIDE A LIST OF CLIENTS FOR WHOM THE AGENCY HAD PRIMARY RESPONSIBILITY FOR BRANDING AS WELL AS DEVELOPING AND DESIGNING A WEBSITE.

Heartland Advisors
AllPartGrills.net
IrishSheetMusicArchives.com
Milwaukee Metropolitan Sewerage District
Whyte Hirschboeck Dudek S.C.
Irishfest.com
Alfa Tools
Stringer Cellar Wines

9.3 YOUR STORY

9.3.1 BRIEFLY SHARE YOUR AGENCY'S STORY AND INCLUDE BACKGROUND/BIOGRAPHIES ON THE PROPOSED TEAM FOR THIS WORK.

ABOUT NORTHWOODS

Northwoods Software provides web design and development, custom software development, and enterprise content management (CMS) design and implementation expertise to over 750 clients nationwide.

Northwoods has built a reputation as a thought leader in web design through our award winning work, our commitment to mastery of the latest technologies, and our passion for ongoing education for our team, our clients, and the community.

BRIEF HISTORY

Northwoods was founded in 1997 by twelve colleagues who joined forces to build a company specializing in web development and software engineering. Leading this group and initiative was Northwoods' President, Patrick Bieser, an accomplished entrepreneur, software executive, programmer, and web usability expert.

Since then we have handpicked in-house design and technology professionals who all share a passion for creating top quality websites and software applications.

OUR SERVICES & SOLUTIONS

Strategic eBusiness Consulting
Creative Graphic Design
Website Design & Development
Product eCatalog Systems
eCommerce Systems
Intranet & Extranet Development

Titan CMS Solutions
Sitecore CMS Implementation Partner
SharePoint Development Services
Content Migration Services
Orphaned Software Rescue Services
Hosting & Security Consulting

Brand and Logo Development
 Digital Strategy & Review Consulting
 Web CMS Training & Support
 Social Media Applications
 Site Globalization/Multi-Language
 Strategic eMarketing Consulting

Software Engineering
 Search Engine Marketing
 Search Engine Optimization (SEO)
 Mobile Website and App Development
 Interactive Rich Media (Flash, JQuery)
 Content Marketing/Inbound Marketing

OUR EXPERIENCE

The specialists at Northwoods have substantial backgrounds in many disciplines, and have successfully deployed complex website and software projects in a wide variety of business sectors.

- 750+ clients worldwide with over 2,000 projects completed
- 400+ websites running on the Titan CMS platform
- 5,000 authors and editors using Titan CMS
- Listed twice in the *Inc 500* as the Fastest Growing Company in the US
- Awarded the Future 50 four times by MMAC and the Business Journal
- Listed among the Top 25 Software Companies by Small Business Times magazine
- Named one of the Best Places to Work by BizTimes Magazine
- 3,000+ people have attended a free weekly Northwoods Workshop or Seminar since 2005
- Certified Microsoft Partner

BACKGROUND/BIOGRAPHIES OF PROPOSED TEAM

Our staff is locally based in Shorewood, Wisconsin. Our office space supports a great deal of activity. Each week developers meet with a group of their peers and review code for their projects. Designers share ideas and the latest in web design techniques. We also have numerous events for clients including supplemental training, learn @ lunch sessions and user group meetings.

Your proposed team is a top-notch group of brand strategy, design, and technology professionals all sharing a passion for creating functional and useful web sites and applications. They will be involved at various stages in the process. Some will be engaged throughout.

Patrick Bieser / Executive Sponsor



Patrick Bieser founded Northwoods Software Development in 1997. In addition to serving as president, Patrick oversees web strategy, Titan CMS product design, and software architecture decisions on major projects. Patrick is expert in the areas of content management, information architecture, co-branded web sites, and B2B web sites.

Jim Brophy / Director of Digital Services



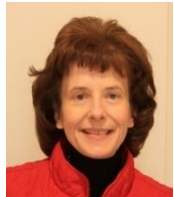
Before joining Northwoods several years ago, Jim gained valuable digital marketing experience as an Account Director at a high-powered digital agency in Milwaukee and also led the Digital Services practice at a highly-respected integrated marketing communications firm in the Minneapolis and Milwaukee markets. He provides digital marketing integration insight and direction to all of the firm's clients. Specialties include: Management consulting, B2B web strategy, account service excellence, consultative/solution selling, project team management, e-business consulting, use-case development and user heuristics, SEO/PPC and content strategy, conversions, responsive and optimized mobile site strategies, Extranet/Intranet best practices, CMS implementation, team leadership, budget and project estimation, service delivery oversight, and continuing client education.

Tom Pappas / Relationship Management



With over 20 years' experience in driving web solutions business liaisons, Tom provides ethical and timely attention to a client's contractual and project definition requirements; from the first handshake and beyond project completion. Tom is a true client advocate ensuring your needs are being met from the services team.

Patty Clemens / Account Director



Patty Clemens has been a Northwoods Account Director for the past 16 years. Prior to Northwoods, her career included software development, corporate training and executive HR management. As an Account Director, she enjoys the challenges of managing large projects and tight deadlines. Her interests are information architecture, digital strategy analysis and technical writing. In her Account Director role, Patty has been responsible for projects and/or website implementations including Milwaukee Public Schools, Archdiocese of Milwaukee, Badger Meter, Catholic Financial Life, Harris Associates and the Medical College of Wisconsin. She oversees our training department and conducts the Webmaster Administration training for clients.

Eric White / Senior Technical Architect and Developer



Eric is a Senior Solutions Architect for Northwoods. Having helped build the foundation for multiple start-up software companies before coming to Northwoods in 2004, Eric brought with him a deep understanding of software system design and the software development process. Eric provides technical leadership for several of Northwoods' largest clients. He produces solution architectures and leads development teams to completion on in-house and global projects in excess of \$500K. Eric's ability to quickly earn the respect and trust of the project team and stakeholders through clear communication, diplomacy, and honesty are paramount to the success of his projects. In addition to his project work, Eric provides process oversight for the Northwoods' development group and is a key influencer for many of the development, automation and quality assurance processes in use at Northwoods today.

Rachel Carter / Senior Digital Marketing Strategist



Rachel is a digital marketing strategist at Northwoods specializing in digital marketing, including content marketing, social media, SEO and PPC. She focuses on developing content strategies for customers like Vollrath, HED, Lutheran Social Services, and many others. Rachel draws from best practices, current trends, and previous experiences to help clients meet their digital marketing goals.

Juliana Best / Design Front-end Project Manager



With Northwoods for 10 years, Juliana provides talented hands-on and resourceful interactive, creative, and front-end project management expertise. She brings a wide range of experience in production and supervision to strategic web-based projects. JJ is well known for providing creative quality control to ensure that all projects meet budget, brand standards, and overall web-standards of excellence.

Jason Frelich / Senior Interactive Web Designer & Web Developer



Jason is an Interactive Web Designer & Web Developer with more than 10 years of digital and graphic design experience. Jason uses his design instincts to create beautiful, user-friendly websites for clients in a variety of industries, from Milwaukee Irish Fest to Vollrath Manufacturing, while ensuring functionality across all devices

Pam Zimmerman / Testing Administrator



Pam Zimmerman is an experienced Testing Administrator with Northwoods Software Development, Inc. She is proficient in validating complex software development in an efficient and thorough manner. Over the past sixteen years, Pam has tested software for a wide range of businesses including insurance, governments, travel, manufacturing, and financial, as well as being the lead tester of Northwood's Titan CMS version releases.

Pam has been recognized with the "Coder Hat of the Month" award by her fellow developers, whose code she tested. She was the first tester to receive this honor for her testing skill. Pam also brings a positive attitude and team spirit to get the job done, while also having fun.

9.4 SCOPE REQUIREMENTS

9.4.1 WEBSITE AND CREATIVE DESIGN

9.4.1.1 DESCRIBE YOUR PLANNING AND CREATIVE PROCESS FROM BEGINNING TO FINAL EXECUTION, INCLUDING:

YOUR ORGANIZATION'S PLANNING PROCESS FOR WEBSITE DESIGN



Our proven framework for delivering successful websites has been a key differentiator for Northwoods for many years.

As a framework, we continually refine our approach based on emerging user and design trends, technologies, platforms, media and heuristics.

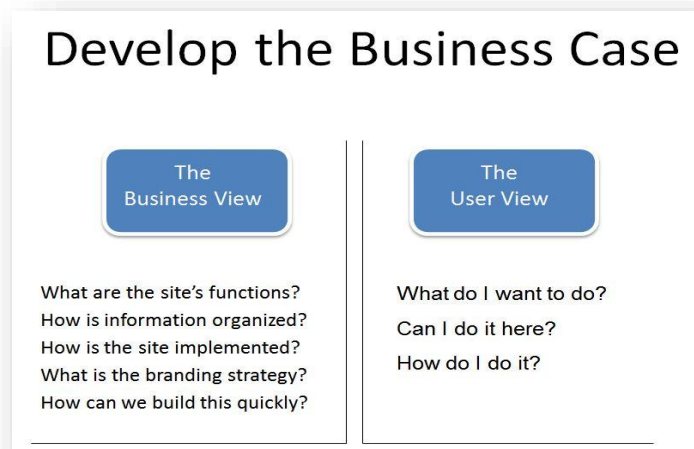
Discover

Our planning, or Discovery phase, is structured to inform our information and graphical designers as well as our clients as to what is important to all users of their websites and content.

Therefore, Northwoods begins all digital projects with the end in mind. We begin with “how can your digital ecosystem work harder and smarter for you?” “What are your websites primary objectives and goals?” “Who are your primary and secondary audiences?” “What do you want people to be able to do?” “What do your users want to be able to do?” What actions do you want them to take?

We refer to this as “User Centric Design”. We want to understand your user’s needs, which most of the time are quite different from the business, or organizational needs. Organizations concern themselves with questions focused around how they view themselves while rarely considering the user.

We combine the steps in our planning framework with the needs, aspirations and features that users want, or the User View.



How the user intuitively and easily finds relevant information should inform what content is important and how that content is organized for their needs. This insight will allow them to obtain their goals and your objectives, which if done so properly, can be measured and acted upon.

Our planning begins with a digital strategy to inform our overall process. The framework for our design planning is developed by undertaking the relevant steps of our framework and typically includes:

- Primary and Secondary audience identification
- Key Performance Indicators (KPI's) and Goal Development for Audiences
- User interviews/Focus Groups
- Persona development
- Brand/style guide/identity assessment – Digital brand alignment
- Developing mood boards for creative execution
- Google Analytics (or other analytics package) assessment to benchmark current metrics
- SEO Audit
- Local SEO Audits
- Technical SEO Audit
- Paid search assessment
- Remarketing assessment
- Content marketing assessment and link profile
- Content inventory
- Heat maps
- Lead generation/conversion strategies
- Taxonomy development, if applicable
- Information Architecture and Site Map

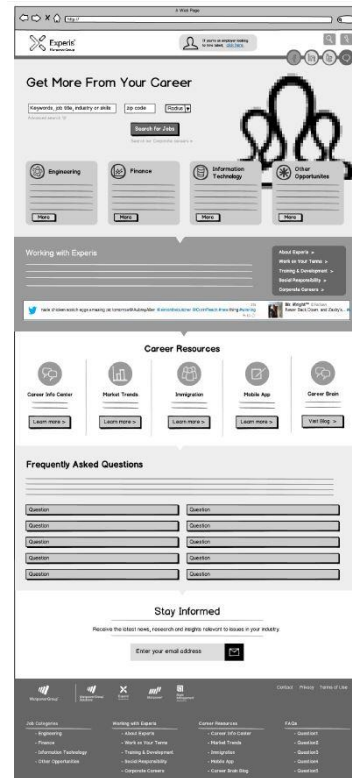
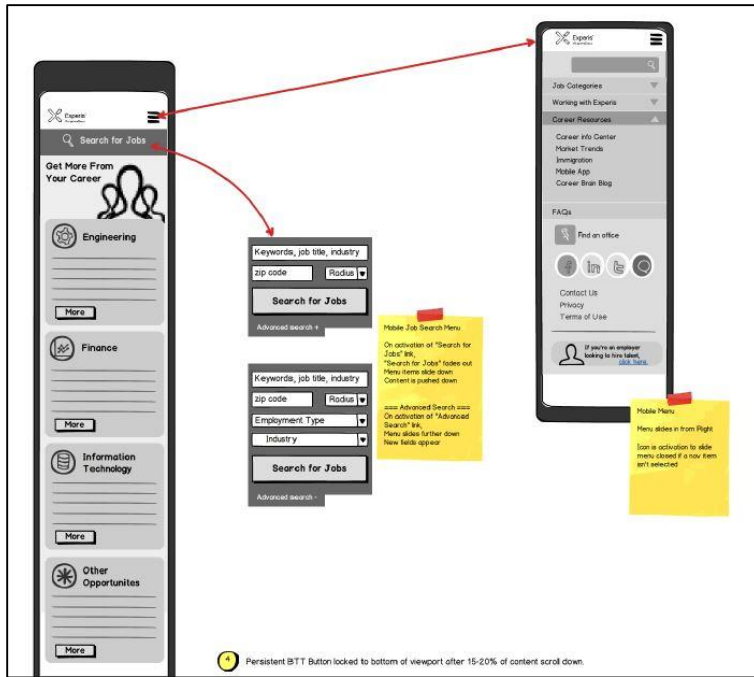
Based on our findings, we present content, features, design, and measurement recommendations. Once these are agreed upon, we then begin the design phase by wireframing key pages throughout the site.

Design

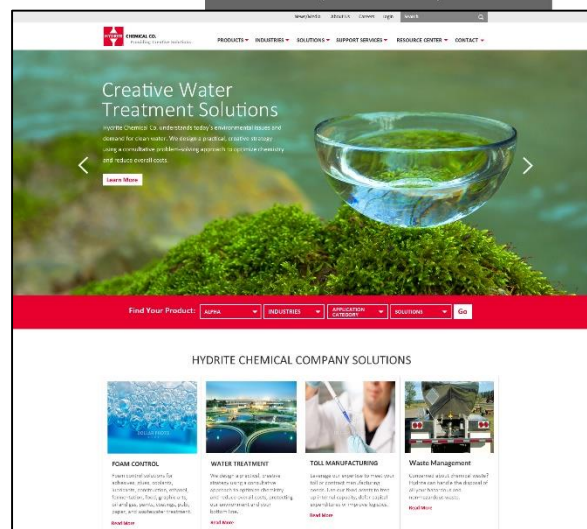
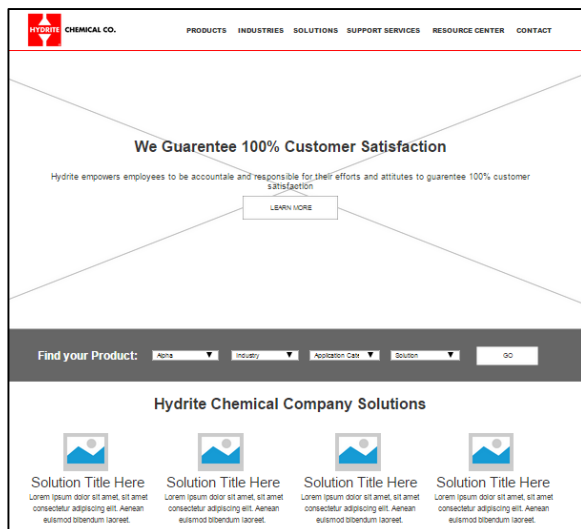
Our design phase brings to life the findings from our planning. In the design phase, we will:

- Wireframe key pages throughout the site for all device types
- Review and revise the wireframes
- Agree on the wireframes
- Develop composite designs for all device types
 - Apply mood board attributes
 - Apply brand/logo standards
- Review and revise designs
- Agree on final design approach

Once the final composite designs are approved, we move into the development/implementation phase of the project.



Wireframe examples – devices (left) and desktop (right)



Wireframe is above left with the corresponding design comp on the right

STRATEGIC AND LONG TERM PLANNING

Northwoods is a learning and teaching organization. All of our disciplines – Account Service, Project Management, Front-end and Back-end developers, Mobile Application and Software Engineers, QA - have weekly meetings to share ideas, review projects in process and critique deliverables. In addition, Northwoods conducts 60 free workshops annually on a variety of digital topics ranging from digital strategy to Microsite best practices. We bring this collective knowledge to each and every client during annual website reviews.

Our strategy and account teams meet internally to review your goals, objectives and website performance to provide you with findings and recommendations for improvement. These annual reviews are typically complimentary and are intended to provide you with feedback and advice on how well your goals are being met, what you can do to potentially improve performance and to educate you on emerging strategies, trends and advances in technology and digital innovation.

COMMUNICATION PROCESS WITH THE CLIENT

Northwoods believes in and practices a consistent, transparent communications process with our client partners. During engagements, Northwoods provides regular status reports that update all stakeholders regarding completed tasks, known issues, new requests and resolutions. When joint meetings are held, Northwoods provides conference reports and/or meeting notes to all stakeholders. We utilize a third party issues management system (Jira) during design, development, testing, deployment and post-launch to allow our clients to report and post issues, log bugs, request enhancements, and communicate concerns. Northwoods uses this system to update clients on development progress, issues resolution, and all other project related activity. In many cases we maintain these accounts for our clients to provide an on-demand vehicle for communication well after their projects have concluded. Northwoods also has a dedicated support email address for clients to use as well as a help desk function for triage and issues resolution.

9.4.1.2 PROVIDE THE URL FOR TWO WEBSITES OF SIMILAR SCOPE TO WWW.COUNTY.MILWAUKEE.GOV THAT YOUR ORGANIZATION HAS DESIGNED, AND INCLUDE A ONE-PAGE SINGLE-SPACED DESCRIPTION FOR EACH URL THAT DETAILS THE FOLLOWING:

URL EXAMPLE # 1

<http://mps.milwaukee.k12.wi.us>

CLIENT BACKGROUND

Milwaukee Public Schools (MPS) is the largest school district in Wisconsin serving more than 78,000 students in 160 schools in the 2014-2015 school year. MPS offerings include neighborhood schools, specialty schools and charter schools serving students as young as age three (3) through grade 12. MPS also has about 9,500 full-time equivalent (FTE) staff positions

CLIENT CONTACT INFORMATION

Amy Kant, Webmaster, Department of Communications and Outreach, Milwaukee Public Schools
Phone: 414-475-8902 Email: kantam@milwaukee.k12.wi.us

WEBSITE USER PROFILE

The MPS website serves users across the Milwaukee Community, the Milwaukee Schools and their employees, the 78,000 students, associated teachers and families, and employees of the MPS district. As a portal, it also provides access to the MPS Intranet (mConnect) and the Parent Portal (Infinite Campus) Office 365 and the MPS Employee Self Service portal.

REASONING FOR NAVIGATION AND DESIGN

Northwoods conducted parent, student, staff, curriculum, department and employee interviews and focus groups to understand needs, wants, aspirations, and goals for the new sites and the deficiencies and failures of the old sites to inform our information architecture and design. We gave students the opportunity to show us sites they liked and why. We had parents tell us the most important items for them, and why. We had each group conduct card sorting exercises to understand how they wanted the content presented to them organized. In all, over 500 individuals participated in some form of input and conversation into what information, features and tools would best serve their needs on any device, 24/7, on the new and improved MPS website.

SUCCESSFUL FEATURES, FUNCTIONALITY AND DESIGN ELEMENTS IMPLEMENTED TO ENHANCE THE USER EXPERIENCE

- In examining the site search logs of the old site, we discovered that the top 10 searched items made up more than two-thirds of the search traffic. Instead of providing a long search results page that forced users to think about which result was most relevant to them, we implemented a search by-pass feature. This allows for a quick connection directly to the calendar landing page if someone searches “school calendar”. Or right to the lunch menu if someone typed “lunch today”.
- We employed mega menus underneath each one of the global navigation elements, and these can be updated by MPS staff, based on the frequency of access. This allows user to directly find the landing page they are looking for in one click or touch. In addition, they can include photos and modify page links in the menus themselves.
- The site has an alert panel that drops down from the top of the site in red in the rare case that some sort of emergency message needs to be communicated quickly, such as school closings or other types of emergencies.
- The calendar function has been greatly enhanced to allow for filtering by type and category events and functions users want to explore. It also allows users to submit single and recurring events for approval and publication on the calendar.

- MPS is a case study for workflow. Nothing gets added to the site unless it has gone through 2-3 workflow steps. The Webmaster reviews everything, ensuring consistency on the website.
- “Find a School” interfaces with their internal Entity system to pull in the latest school data. In addition on the “Find a School” page, we offer proximity search capabilities to find schools based upon the entered location.
- Job Openings are fed by an internal PeopleSoft system and updated nightly.
- Use of A-Z index for filtering; heavy use of filter blocks to provide users with the ability to easily find information
- Intranet (mConnect) supports LDAP authentication for employees.
- Language translation, primarily Spanish (most of the public site is available in Spanish)
- Implementation of filter blocks found in base Titan for the student’s resources page, which before the redesign was a giant mess of poorly organized links, and seldom used. The user experience has been drastically streamlined and is now a useful resource for students.

The home page contains the most important features and tools that all groups consistently asked for:

- The ability to highlight success stories and update these frequently
- Upcoming events
- Today’s Menu
- How to quickly and easily find a school
- Content gateways for each audience
- Policies, Procedures
- Superintendent content

HOW YOU INTEGRATED THE BRAND INTO THE DESIGN

All we had to work with was the existing MPS logo and their primary color. With so many decision makers in the organization, we decided to develop a mood board with design elements to present to the board and other stakeholders. By using this approach, we were able to gain consensus on the overall look and feel of the site and integrating their logo into a contemporary, click and touch experience that no one had really been exposed to before. By taking this step, we set and managed expectations on how the composite designs were going to look and feel. Additionally, we had three different designers comp the home page, providing subtle differences of how the site would look based on the wireframes. MPS actually wound up using elements of all three designs in the final design.

The MPS mood board on the following page:

URL EXAMPLE #2

<http://www.skygenusa.com>

CLIENT BACKGROUND

SKYGEN USA is a world-class collection of benefit management companies bringing next-generation claims management and technology tools together for healthcare organizations to be market-leading and reform-ready.

CLIENT CONTACT INFORMATION

Christine Rudella, Director of Marketing

Phone: 262.834.4145 Email: Christine.Rudella@skugenusa.com

WEBSITE USER PROFILE

Dental, Medical, Vision, Pharmacy, Therapy benefit administrators, Software and Claims Management professionals, Medicaid networks, Commercial Insurance Payers, Claims Administrators, Patients

REASONING FOR NAVIGATION AND DESIGN

SKYGEN USA is a new brand umbrella for 5 existing companies.

We wanted to build a brand architecture that provided the same user experience across all domains consistent with the newly branded parent company, while allowing all services to be available at any time to any user.

They wanted to communicate to dental users that SKYGEN USA also provided healthcare benefit management, etc., so cross-selling was an important objective.

In addition, two microsites were built, one for the benefit management companies and one for the technology companies to house their best-in-class thought leadership, such as blogs, white papers, articles, and press releases.

Thought leadership leads to sound SEO practices in providing authentic content and inquiries into their technology products and services.

In addition, each of the family of companies can be accessed through their own domains directly.

Design principles are meant to communicate a contemporary company who is forward thinking and technology focused.

SUCCESSFUL FEATURES, FUNCTIONALITY AND DESIGN ELEMENTS IMPLEMENTED TO ENHANCE THE USER EXPERIENCE

The site has two microsites that serve as Knowledge Centers for the Benefit Management and Technology sides of the business. This is where the Family of Companies thought leadership resides and is effective for drawing users in, providing cross-selling opportunities and generating leads.

The Blog sign-up and contact forms are integrated with their salesforce.com platform so incoming sign-ups and leads can be immediately assigned to the appropriate people for follow-up.

All of the sites are responsive and possess the latest design trends, such as touch dot navigation, consistent striping of content, and accordion FAQ sections so that users can always view the questions they need answered.

The sites have almost identical navigational elements so that no matter which site the user is on, they intuitively know how to navigate the site.

HOW YOU INTEGRATED THE BRAND INTO THE DESIGN

We start by developing a mood board/style guide, which reflect the brand attributes and integrate this into the overall design of the sites.

The brand is forward thinking and technology driven, so we employed some of the latest design trends and technologies to bring the site to life while positively impacting the user experience.

Their thought leadership is front and center, reflecting their forward thinking, innovative approach to benefits management and supporting technologies.

SkyGen Style Guide:

SKYGEN STYLE GUIDE

DESIGN GOAL

- Contemporary
- Forward Thinking
- Technology Focused
- Clean
- Modern
- Cutting Edge
- Comprehensive
- Flat Design
- Responsive Design
- Google Fonts
- Large Fonts
- Large Imagery

TYPOGRAPHY

HEADERS
Font: Roboto
Size: Various

ROBOTO
Roboto

BODY COPY

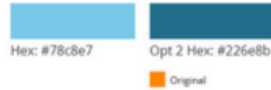
Font: Open Sans
Size / Line Height: 15px / 24px
Color: #333333

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean euismod bibendum. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean euismod bibendum. Lorem ipsum dolor sit amet, consectetur adipiscing elit.

COLORS



COLORS



BUTTONS



COLORS



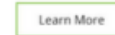
BUTTONS



COLORS



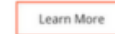
BUTTONS



COLORS



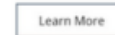
BUTTONS



COLORS



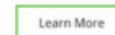
BUTTONS



COLORS



BUTTONS



COLORS



BUTTONS



9.4.1.3 DESCRIBE ONE OTHER GOVERNMENT-FOCUSED WEB DESIGN PROJECT THAT YOUR ORGANIZATION SUCCESSFULLY COMPLETED.

Milwaukee Public Schools Public Website

Milwaukee Public Schools (MPS) is the largest school district in Wisconsin serving 78,502 students in 160 schools with 9,493 full-time equivalent (FTE) staff positions.

The Milwaukee Public Schools system is the one of the largest in the United States by enrollment.

Via RFP, MPS solicited many firms and Northwoods was awarded the opportunity to be the qualified and established technology partner to provide all labor, equipment and services, including training and ongoing support, necessary to design, develop, and implement new, innovative, responsively designed district websites for both public and internal audiences.

Some of the Northwoods' process included:

- Formulating and prioritizing final scope and project timelines
- Uncovering and defining potential project risks and related contingency plans
- Conducting content inventory for all MPS existing websites
- Developing draft and final site maps
- Preparing for and facilitating focus groups with principals, teachers, students and parents
- Performing heat map analyses of existing websites
- Developing wireframes and comprehensive layouts
- Establishing development environment at Northwoods
- Prototyping responsive website design composites
- Testing design within browsers and devices
- Quality Assurance testing with various audience types
- Super-user and user training for webmasters and authors using Titan CMS
- Implementing Titan CMS on Production Server
- Attentive and consistent support during and after launch

Northwoods' main deliverables included:

- Contemporary public website with a highly usable responsive design
- Titan CMS platform seamlessly integrated with multiple enterprise and third-party applications
- Intuitive audience-based funnel navigation
- Americans with Disabilities Act (ADA) and Children's Online Privacy Protection Act (COPPA) compliant
- Multi-lingual capabilities
- Distributed content management and managed workflow through Titan CMS
- Providing MPS student internship opportunity

Website: <http://mps.milwaukee.k12.wi.us/en/home.htm>

9.4.2 BRANDING

9.4.2.1 DESCRIBE THE PROCESS YOUR AGENCY USES TO CREATE A BRAND FOUNDATION THAT ALLOWS AN ORGANIZATION TO MEET ITS MARKETING OBJECTIVES? WHAT ARE THE DELIVERABLES?

As scope for a County-wide branding effort is not well defined in this RFP, Northwoods is providing a high-level, generic overview of our framework to create a brand foundation to meet marketing objectives (which at this time are also unknown/undefined for the County) and sample deliverables that may or may not be applicable, depending on the scope.

There are a variety of objectives Northwoods can envision for Milwaukee County:

- Sharpen the County's brand identity
- Communicate a more compelling value proposition and competitive positioning
- Adopt a more strategic approach to marketing

We achieve this through research, which might include the following:

- Validate/uncover perceptions/attitudes/awareness of Milwaukee County services and value for residents and/or businesses
 - The same relative to surrounding counties, such as Waukesha, Dane, Ozaukee
- Uncover changes in resident/business segments, based on existing research, if available
- Assess perceptions on current levels of services and any gaps of what is expected and what is provided
- Understand how residents/businesses are reacting/responding to current communications tactics
- Determine how best to reposition Milwaukee County
- How do these perceptions correlate to online perceptions of the County website in its current state

We would begin by reviewing/analyzing any available data and analysis the County may currently have on hand from previous efforts, if still relevant.

Northwoods, in designing the user interviews/focus groups for the website, would structure qualitative and quantitative research to develop strategies to meet the assumed objectives. Qualitative research would involve identifying individuals, business owners and other stakeholders to interview, either individually, in focus groups, or a combination, based on available budget.

Quantitative research might be conducted through a variety of ways, including but not limited to online surveys, phone calling, online polls on the current site, etc.

Sample discussion points for Qualitative research might include:

- Perceptions of Milwaukee County and those of neighboring counties

- Awareness of all types of communications tactics, including media, social channels, RSS feeds
- Brand messaging reactions, including the use of any department level or county-wide use of tag lines, mission statements, etc.
- Why do you do business/live in Milwaukee County
- Brand sentiment – describe and articulate through a variety of methods emotions and thoughts of the County, its reputation, etc.

Once the data has been collected, a GAP analysis would be conducted to uncover opportunities for improvement and work with the County to prioritize these improvements. In our experience, combining brand strategy and website strategy in the research/Discovery phase results in a wealth of information beneficial for traditional and digital communications and connects messaging between traditional and digital outreach.

However, it is important to note that there is no longer is a distinction between traditional marketing strategy and digital strategy.

Rather, it is strategy in a digital world.

This is why, during focus group sessions, depending on the scope of the branding effort desired, Northwoods suggests including the branding steps with the user interviews/focus groups for the County portal. The website should reflect the county's brand strategy, and vice-versa.

Deliverables for a brand foundation might include:

- Brand identity
- Value proposition
- Brand positioning
- Key messages
- Brand personality
- Brand-building strategies
- Communications plan to promote the redesign project

9.4.2.2 PROVIDE TWO BRANDING EXAMPLES OF WORK SIMILAR TO THE REQUIREMENTS OUTLINED IN THIS RFP. INCLUDE CLIENT CONTACT INFORMATION FOR EACH EXAMPLE.

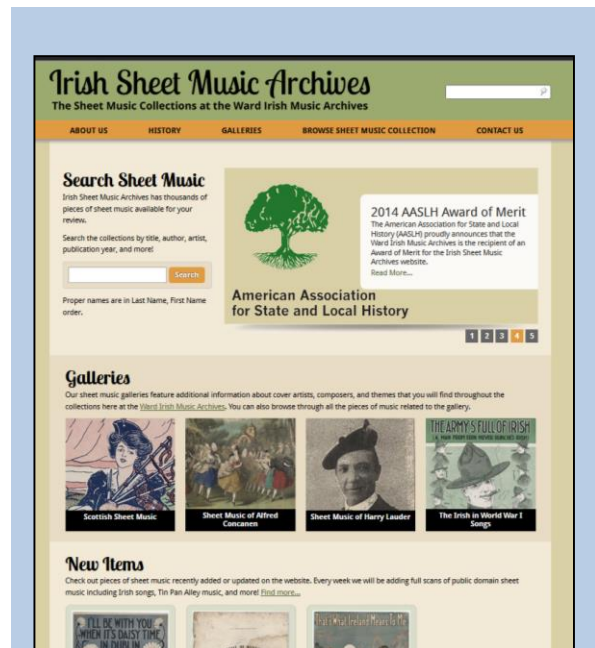
Example #1 – Milwaukee Irishfest

Milwaukee Irishfest was in need of a consumer facing website redesign that promoted Irish-American culture and Music. However, they had a brand challenge. Irishfest, as it is commonly known, is both an organization and an event. The challenge was to communicate the year round events Milwaukee Irishfest promotes, their offerings for Music classes and Summer School, and the vast collection of Irish archival music they have accumulated over the years as well as the festival itself. Think of these as distinct “departments” within the Milwaukee Irishfest organization.

Northwoods developed a vanguard approach: Redesign the festival site, providing an online brand presence for Irishfest.com, while developing a three-year strategic plan to bring online the additional “department sites” with unique URL’s, themes, brand attributes, messaging and unique functionality. Northwoods did utilize the logo that was the identity of Irishfest in order to meet the August 2012 festival event, however the style guide, look and feel, and brand architecture was developed by Northwoods.

The 3 year plan and brand architecture called for a phased rollout of 6 websites that would eventually live under the Milwaukee Irishfest corporate umbrella. The first of the sites was dedicated to their vast sheet music collection. Northwoods worked with Irishfest to develop the typography of the site as well as the overall look and feel and user experience. CHOICEconnect, a publication of the Association of College and Research Libraries reviewed the Sheet Music site in September of 2014, and had this to say:

“This archive’s design is consistently elegant, uncluttered, and richly illustrated. The potential for such a resource is enormous: scholars of 19th-century visual culture, printing, publishing, illustration, design, technology, and history--as well as music performers, composers, and historians--are richly served by this archive. Whereas online resources such as COMHALTAS (<http://comhaltas.ie/music/>) provide free access to Irish sheet music, no other site offers the visual and historical scope of the Ward archive. This resource possesses value and relevance



Irish Fest

www.irishfest.com

Ward Irish Music Archive

www.irishsheetmusicarchives.com

Irish Fest Scrapbook

www.irishfestscrapbook.com

Irish Fest Summer School

www.irishfestsummerschool.com

far beyond its scope, because in addition to being an invaluable source for Irish music, the site sets a precedent for online archive design and functionality”.

http://choiceconnect.org/webclipping/185269/3t_ptm2x_vf9zyl2m79ydml-i8xm7ehxxgaet33sm9pau127uy

Northwoods has rolled out the “department” sites and is currently developing the main “Umbrella” site for the Milwaukee Irish Festivals Inc. site, which will have its own brand identity and serve as the portal for all the sites Milwaukee Festivals Inc will be managing in Titan CMS.

Example #2 – Heartland Funds

Already a long-term client of Northwoods, Heartland Funds wanted to change their branding and asked Northwoods to develop their brand architecture as well as how best to communicate a consistent branded message to several distinctly different, yet similar, audiences. They had one site that had grown stale and as users became more sophisticated in navigating websites wanted to segment those users without sacrificing a consistent brand theme and user experience across three target audiences – Individual Investors, Financial Professionals, and Institutional Investors. The guiding principle of any sound website design is that the user experience IS the brand, as well as consistency across domains, departments, audiences, etc.


Northwoods proposed a responsive site that had a consistent look, feel, experience and tone across these different sites yet contained different content. All under one domain, users could toggle between sites through the use of a brand switcher whenever they needed or wanted to.

Northwoods developed the online brand, color scheme, typography, and style guide that Heartland began to use in their traditional collateral materials.

This branding strategy was developed by talking to users in focus group settings and asking them to articulate their reactions when hearing the Heartland Funds name, what they stand for, what kind of content would they expect and how it should be communicated. Northwoods developed a brand architecture to support all audiences, provide access to all of Heartlands services at all times, educate and inform with authoritative content, and provide robust search methods.

The online results on the following 3 pages:

Individual Investor Site:



Individual Investors
HEARTLAND FUNDS
AMERICA'S VALUE INVESTOR


[Contact Us](#) | [Press Area](#) | [Shareholder Log In](#)

About Heartland
Mutual Funds
Views & Commentary
Forms & Literature
Account Resources

How the Polar Vortex Could Heat Up Your Portfolio

The colder-than-norm winter could benefit natural gas companies

[Watch the video ▶](#)



Daily Prices and Performance


Investor Class
Institutional Class
Average Annual Fund Returns | [Open an Account](#)

	Price	Change	% Change	Factsheet	Overall Morningstar Rating™ -2/28/2014	Category	Total Funds
Select Value HRSVX	34.72	-0.04	-0.12%		★★★★	Mid-Cap Value	367
Value Plus HRVIX	37.59	-0.13	-0.34%		★★★★	Small Value	312
Value HRTVX	50.65	-0.12	-0.24%		★★★	Small Value	312
International Value Fund HINXX	11.01	-0.04	-0.36%		★	Foreign Small/Mid Value	43

Based on risk-adjusted performance

Growth of a Hypothetical \$10,000 Investment Since Inception*

Since inception of the investor class, 12/28/1984 to 12/31/2013



Value Fund

Pursues capital appreciation and liquidity by investing in micro- and small-cap companies

Account Access

- ▶ [Shareholder Account Access](#)
- ▶ [Open an Account](#)
- ▶ [Receive Statements by Email](#)

Contact the Client Relations Team by email or at 800-432-7856.

Take Me To:

Fund Name

Document Type

Task Type

News and Commentary

- 2013 Distributions and 2014 Distributions Calendar Available 12/27/2013
- Opportunities in the Mid-Cap Space, says Portfolio Manager Colin McWey 3/29/2014
- Discipline Still Matters 3/31/2014
- Column by Portfolio Manager Bradford A. Evans in Milwaukee BizTimes 2/3/2014

Subscribe to Emails

Name


Email

Monthly e-news

Quarterly Fund factsheets and commentary

Subscribe

Financial Professional Site:




Financial Professionals
HEARTLAND FUNDS
AMERICA'S VALUE INVESTOR™

Log In | Events | Contact Us | Press Area

About Heartland
Mutual Funds
Process & Philosophy
Views & Commentary
Forms & Literature

4Q13 Materials Available
Commentary, attribution, contribution, holdings, and factsheets are available
[Get materials](#)



Upcoming Events

- Pershing INSITE 2014
6/4/2014 to 6/6/2014
- Morningstar Investment Conference
6/18/2014 to 6/20/2014
- Heartland Due Diligence Event
9/10/2014 to 9/11/2014
- Charles Schwab IMPACT 2014
11/4/2014 to 11/7/2014

Performance and Risk Statistics

Investor Class
Institutional Class
Average Annual Total Returns

5-Year Risk Analysis* - 12/31/2013

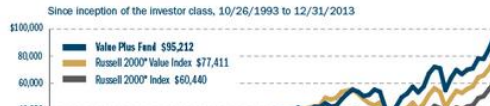
	Alpha**	Standard Deviation (%)**	Beta	Info Ratio	Sharpe Ratio	R-Squared (%)	Factsheet
Select Value HRSVX	1.96	17.66	0.97	0.33	1.04	92.05	
Value Plus HRVIX	2.81	19.23	0.85	0.06	0.94	89.16	
Value HRTVX	4.35	19.71	0.84	0.24	0.99	84.26	
International Value* HINVX	-0.61	14.68	0.75	-0.24	0.24	77.72	

*Data for the International Value Fund is only available for a 3-year period.
**Annualized.
Alpha, beta, and information ratio are versus the Russell 2000® Value Index for the Select Value Fund, Russell 2000® Value Index for the Value Plus and Value Funds, and MSCI AC World Index ex USA Small Cap Value for the International Value Fund.

Growth of a Hypothetical \$10,000 Investment Since Inception*

Select Value
Value Plus
Value
International

Since inception of the investor class, 10/26/1993 to 12/31/2013



Value Plus Fund
Invests in undervalued small companies and seeks to reduce volatility through strong balance sheets and dividends

1Q14 Information Releases

- Distributions
12/27/2013
- Investment Outlook
4/2/2014
- Anticipated 4/10/2014
Top 10 Holdings
- Anticipated 4/14/2014
Factsheets
Commentaries
Sector-Level Attribution
- Anticipated 4/20/14
Full Holdings
- Anticipated 4/21/2014
Security-Level Attribution
Contribution

Water & Wells

Perspective a world away from Wall Street

- Time for Nat Gas Stocks to Come in From the Cold?
3/3/2014
- Morningstar Q&A: Where to Find the Small-Cap Winners
2/24/2014


[View all](#)

1572 E Capitol Drive, Shorewood WI 53211
414.914.9100 | northwoodsoft.com

CONFIDENTIAL

Page 104 | 39

Institutional Investor Site:



Institutional Investors
HEARTLAND FUNDS
AMERICA'S VALUE INVESTOR®




[Log In](#) | [Contact Us](#) | [Press Area](#)

About
Strategies
Mutual Funds
Process & Philosophy
Views & Commentary
Diligence

4 Ways to Leverage a Multi-Cap Portfolio

Brief papers explain how our multi-cap strategy can be used in a style-driven, core/satellite, top-down, or passive model

[View the papers >](#)

Take Me To:

SMA Name

Fund Name

Document Type

Task Type

E-Subscription Sign-Up

Email Address

Portfolio Manager Perspective

A Second Leg to Our Economic Outlook
3/2014

Industrials: Four Reasons a Not-So-Pretty Sector Looks Good to Us
2/2014

Exploring the Trends Fueling Global Opportunities
2/2014

How Micro-Caps Add Value to a Small-Cap Value Strategy
2/2014

Beyond the Mall: Why Consumers Matter
1/2014


How Do We Know When a Stock is Truly Cheap?
1/2014

Putting Macro Trends in Context: What do They Mean to a Bottom-Up Investor?
11/2013

Capex Conditions are Robust
3/2014 - 2:31

Contrarian Investors Focused on Value

Heartland Advisors, known as America's Value Investor®, is a boutique, independent investment firm in Milwaukee, WI. Our value-focused, actively managed product suite includes distinct U.S. and international investing strategies, which are offered through five [separately managed accounts](#) and four [mutual funds](#).



Our disciplined, [contrarian value investing philosophy](#) is designed to deliver superior long-term investment results. We aim to capture upside potential while limiting downside risk.

Heartland defines value by our proprietary, consistent, and time-tested [10 Principles of Value Investing™](#). Our [Investment Team](#) applies a bottom-up approach that marries traditional fundamental analysis and meetings with more than 1,000 company management teams each year.

We managed \$6.0 billion and our team collectively [owned \\$40 million](#) in our Funds as of December 31, 2013.

Investment Strategies and Focuses

	Offered as SMA	Offered as Fund
Small- and Micro-Cap Value Pursues capital appreciation and liquidity by investing in small- and micro-cap Yes companies	Yes	Yes
Small-Cap Value Invests in undervalued small companies and seeks to reduce volatility through Yes strong balance sheets and dividends	Yes	Yes
Mid-Cap Value Invests in mid-cap, dividend-paying companies	Yes	No
Multi-Cap Value Dynamically pursues the best opportunities regardless of market capitalization Yes	Yes	Yes

For more information, please contact:

Cam Stephenson, Vice President and Director of Marketing, Heartland Advisors, Inc.

Phone: 414-977-8762 Email: cstephenson@heartlandfunds.com

9.5 PROJECT APPROACH

9.5.1 GOAL MEASUREMENT

9.5.1.1 EXPLAIN HOW YOU MEASURE SUCCESS. PROVIDE SPECIFIC EXAMPLES.

All clients come to us with different measures of success. Our job is to uncover the value proposition and develop a digital strategy to help clients achieve the goals that will make them successful.

Northwoods' strategists establish success baselines by performing a number of research and analysis functions. Depending on the client's success metrics we may perform some combination of the following digital strategy services to create a measurement of success baseline:

- Primary and Secondary audience identification
- Key Performance Indicators (KPI's) and Goal Development for Audiences
- User interviews/Focus Groups for user experience (UX) data
- Google Analytics (or other analytics package) assessment to benchmark current metrics
- SEO Audit/Local SEO Audits
- Technical SEO Audit
- Paid search assessment
- Remarketing assessment
- Content marketing assessment and link profile
- Content inventory
- Heat maps
- Lead generation/conversion strategies
- Competitive Analysis

Examples of recent results we delivered to two of our clients:

50 million dollar non-profit enjoyed:

- A 263% increase in traffic to their website from social media from the previous year
- A 227% increase in newsletter signups from the previous year
- A 63% decrease in the number of users who immediately leave their website (Bounce Rate) from the previous year
- An 9% increase in time spent on their website from the previous year

Large B2B Manufacturing firm enjoyed:

- A 267% increase in the number of users coming to the website from the previous year
- A 368% increase in page views from the previous year
- A 300% increase in lead submissions in the first quarter of the launch of the new website.

9.5.2 PROJECT MANAGEMENT

9.5.2.1 EXPLAIN THE FOLLOWING IN REGARD TO PROJECT MANAGEMENT. PROVIDE SUPPORTING DOCUMENTATION AS APPROPRIATE:

OVERALL APPROACH TO PROJECT MANAGEMENT INCLUDING METHODS, TOOLS AND STRATEGIES

Northwoods projects typically follow one of two paradigms: Waterfall or Agile.

Fixed cost projects often follow the **Waterfall approach**, or four D's: Discovery, Design, Development and Deployment. Below are listed typical activities and deliverables for each phase:

Discovery

Activities

- Focus groups
- Storyboarding
- Requirements gathering
- Wireframes

Deliverables

- Business Requirement Document
- Functional Specification/Wireframes Document
- Site map

Design

Activities

- Comprehensive Design based on discovery findings and stakeholder input
 - Review/Revise
- Technical Design based on wireframes and functional requirements
 - Data modeling
 - Define object model
 - Interface definition
- Information architecture

Deliverables

- Design comprehensives

- Technical designs

Development

Activities

- HTML/CSS production for comprehensive designs
- Implementation
- Unit Testing
- QA Testing

Deliverables

- Functional software solution

Deployment

Activities

- Code deployment
- Setup/Configuration of solution
- Post Production Smoke testing

Deliverables

- Final solution

Throughout the project lifecycle, a Northwoods Account Director and Technical Lead keep you updated on project progress via:

- Regular status meetings at a frequency to be determined at project outset and adjusted as necessary. Meeting reviews the project plan which is typically in Microsoft Project or Excel format. Northwoods is flexible in format and has used Google Docs and other technologies.
- Online Issue Tracking System, JIRA, for tracking issues and revision requests during testing and after deployment.

The Waterfall approach typically consists of an up-front investment in planning and design of the application.

The advantage of the Waterfall approach is that by generating blueprints for what is being built, we are able to provide a fixed cost bid with little risk of incurring additional costs for unforeseen features.

The disadvantage is that it can be difficult to define all functionality up front for larger projects. There are often unknowns and features that require proto-typing to fully understand the implementation approach.

In addition, with blueprints on what is being built, there is typically little opportunity to make changes once development begins. Large pieces of functionality can be produced without further feedback and delay. If it is discovered in testing or real world use that the developed functionality provides less than optimal results, correcting the issue can be costly.

For these reasons, Northwoods also runs projects under an Agile paradigm.

The **Agile approach** can be defined as short iterations of the Waterfall approach. At the start of the project, we define a roadmap for the solution. This road map allows breaking the project into smaller functional chunks that can be designed and developed independently of one another while still having an awareness of the overall solution goal and other related functional areas.

The advantages of this approach are:

- Flexibility in making adjustments to the functional requirements throughout the project.
- Stakeholders have something to review and interact with much earlier in the project process
- Typically less costly to change direction/requirements midstream than Waterfall projects
- Continual feedback and collaborative process typically results in more optimal end solution
- Can be beneficial for projects where partial delivery is acceptable, or even desirable to hit business driven deadlines

Disadvantages of this approach are:

- Can have higher overall cost depending on frequency and scope of directional/requirement changes
- Typically hourly, though individual project segments can be fixed bid once defined
- Less formal design and requirements process creates risk for excessive revisions increasing overall project cost
- Multiple partial delivery/deploy activities can increase overall project costs. Waterfall typically consolidates delivery/deployment efforts to one or two iterations. Agile can result in significantly higher number of iterations.
- Significant client engagement is required for entire duration of project versus weighting more of the engagement during the project start. Long term commitment of resources is undesirable for some clients.

Agile is Northwoods preferred approach for internally funded projects with 100% internal stakeholders and project teams. However, due to the level of client involvement and need for flexible budget required for a successful Agile project, it is not always a suitable approach for client projects.

PROGRESS REPORTING PROCESS

Depending on the length and scope of project as well as the individual client's needs, Northwoods holds regular status meetings with our clients to review progress in relation to the project plan established at the beginning of the project. Once a set of features are completed and pass through our quality assurance team, we review the functionality with our client and then turn it over for their testing and approval. Our process of regular status meetings and incremental hands on review provide our clients a clear picture of how the project is progressing.

ISSUES TRACKING (CMS MAINTENANCE / BUG TRACKING)

Northwoods provides an online tracking system built on the JIRA issue tracking platform. During the project, the primary client contact is provided an account for tracking and reporting issues. In addition, an e-mail alias is provided to our client team for reporting issues. This alias allows testers outside the primary client contact the opportunity to report issues while allowing the primary client contact full visibility of all issues reported.

Issues are triaged by the project Account Director or Technical Lead and assigned to the appropriate resource to be addressed. Once addressed, the resource reassigns the issue to a designated quality assurance lead for the project to verify. Upon approval, the updates are moved to our client's User Acceptance Testing (UAT) environment for user acceptance before being scheduled for Production. Northwoods offers clients without dedicated UAT environments a Northwoods hosted environment.

QUALITY CONTROLS

Northwoods has established an effective quality control process consisting of automated build and deployment processes, unit testing, regular code reviews, automated regression, and manual end user testing.

Titan CMS based projects are all developed using a standard Titan Software Development Kit (SDK). Using the kit helps enforce Titan CMS development best practices and standards. In addition, automated build and deployment procedures have been designed for use with the Titan SDK. These procedures ensure code is deployed in the same manner each time. The process ensures appropriate backups and checkpoints to ensure code integrity. Titan SDK deployment processes have been designed both for the Northwoods hosting infrastructure as well as client-hosted infrastructures.

Quality assurance testing combines an automated comparison of screen captures from URLs determined by pre-defined Titan CMS coverage tests combined with traditional end-user testing.

In addition to deployment and testing processes, Northwoods developers attend weekly code reviews for their projects and bi-weekly development meetings to discuss standards, best practices, emerging technologies, and project "show and tell". Not only do these collaborative processes make better developers, they promote code re-use which serves to improve Northwoods overall code quality, reduce costs, and result in continual improvements to a given feature set. The end result is more, high quality offerings for our clients at lower costs.

9.6 INNOVATION

9.6.1 EXPLAIN HOW YOUR ORGANIZATION ADDRESSES THESE DIGITAL TRENDS IN YOUR DESIGN WORK:

PROVIDE SPECIFIC EXAMPLES FOR:

MOBILE AND TABLET

Archdiocese Milwaukee - Mobile Search and filtering

<http://m.archmil.org/mobile/Find-a-School.htm>

CONTENT PERSONALIZATION

Milwaukee Public Schools - Audiences

<http://mps.milwaukee.k12.wi.us/en/home.htm>

USER INTERFACE DESIGN

Childrens' Hospital of Wisconsin - Provider App

<https://provider.childrenscommunityhealthplan.org/Provider-Portal>

9.7 DIGITAL MARKETING

9.7.1 EXPLAIN YOUR APPROACH TO DEVELOPING A SEARCH ENGINE OPTIMIZATION STRATEGY AND RECOMMENDATIONS FOR A WEBSITE SIMILAR IN SCOPE AND COMPLEXITY TO THE COUNTY'S SITE. PROVIDE SPECIFIC EXAMPLES.

A sound SEO strategy begins with understanding the current SEO landscape. Therefore we begin with SEO and Local SEO audits to benchmark current performance.

Northwoods will review your domains for SEO, including a technical evaluation of your URL structure, schema mark-up, redirects, and more.

Northwoods will also research and analyze your current keywords and those of your top competitors, in this case other relevant county websites. Keyword research and analysis is the detective work that unwraps the riddle of how visitors find you online. Our research will identify the terms and phrases to target, and inform us how your customers find you, or don't. Keywords findings and application are the fundamental building blocks of an effective website strategy.

Northwoods SEO strategy includes, but is not limited to:

- Competitive research of competitors to gain insight on their use and rankings of high-valued keywords and historical data of both SEO and PPC campaigns
- Competitive domain analysis and ranking comparison of high value keywords across your site and the provided competitors
- Keyword research on your domain to realize usage, visibility, search volume and keyword list value list
- Understanding your back-link profile with recommendations to strengthen these links and remediate spam links
- A relevant keyword and content strategy for your primary domain(s)

Northwoods will also evaluate your current local search positions, with particular emphasis on online citations and reviews.

Northwoods Local SEO Audit includes:

- Review of current online citations
- Analysis of your current local keyword rankings
- Evaluation of Google My Business set up and listings
- Recommendations of additional citation listings

A recent example is Busch Precision

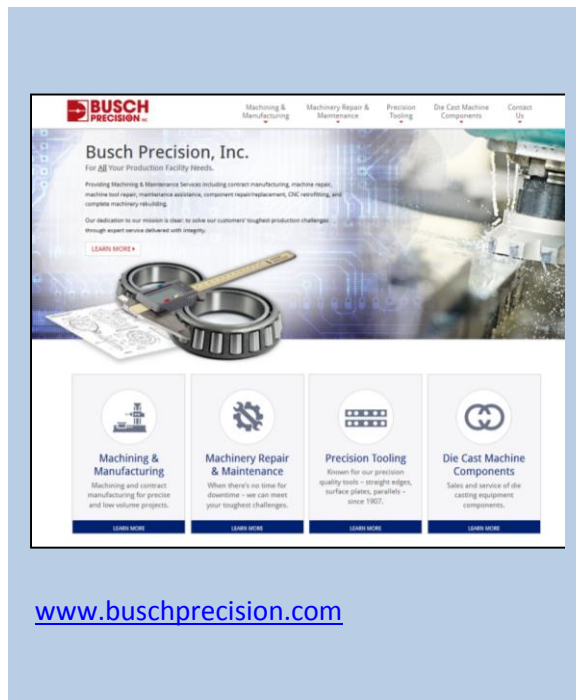
Busch Precision is a precision machining and manufacturing center for unique specifications, critical-tolerance parts, and large components. Busch Precision also excels in providing a single source solution for challenging projects including machine repair, machine tool repair, maintenance assistance, component repair/replacement, CNC retrofitting, and complete machinery rebuilding.

Like many manufacturers, face to face sales were the primary driver for new business since its inception in 1907. When new leadership took over the business, they understood the value of creating a new digital brand presence and marketing strategy to influence a broad audience normal sales staff could not reach.

Northwoods was hired to provide digital strategy and website redesign services. The project completely changed how Busch's services were found online. A stronger focus on utilizing SEO to draw users to the website served as the foundation for building new content on the website.

In the first three months of the new website's launch, Busch Precision experienced the following:

- New visitors to the website increased by 267%
- New page views on the website increased by 368%
- Organic traffic (traffic that came in through Google, Yahoo, and Bing searches) increased by 40%
- Busch Precision received 13 Requests for Quotes on projects in the first three months since the website launch. There were only 5 RFQs received in all of 2014.



9.8 SUBCONTRACTING

9.8.1 DESCRIBE THOSE ASPECTS OR PARTS OF WORK THAT SHALL BE PERFORMED BY STAFF OF YOUR ORGANIZATION AND THOSE ASPECTS OR PARTS OF THE WORK THAT SHALL BE SUBCONTRACTED.

Northwoods intends to perform all work in this project in-house in partnership with a DBE for a percentage of the project.

The plan is to contract with a DBE (designated on Form DBE-14) for anticipated Content Services, which can include but not be limited to migration, editing, authoring, and formatting.

Northwoods plans, as well, for this DBE to perform possible Training Services which can include but not be limited to Titan CMS and content training organization and delivery.

9.8.2 EXPLAIN THE REASONS FOR THE IN-HOUSE PERFORMANCE OF THOSE ASPECTS OR PARTS OF THE WORK YOU ANTICIPATE SHALL BE PERFORMED IN-HOUSE AND EXPLAIN THE REASONS FOR THE ANTICIPATED PERFORMANCE OF THE REMAINING ASPECTS OR PARTS OF THE WORK TO BE PERFORMED BY SUBCONTRACTORS.

Over the past 15 years, Northwoods has developed a highly efficient and quality web development process which has always been performed in-house by our staff.

We have very little turnover at Northwoods and as such are able to provide solid “one-stop” relationship, services, and management beginning with the initial Discovery/Requirements phase to Branding, Design, Development, and Deployment.

Our disciplined approach results in budget adherence, consistent project management, and a very satisfied client.

The plan is to provide our DBE partner opportunities to deliver Training and Content Services with our oversight and direction.

Working with DBE subcontractors is an opportunity to develop new business relationships and to encourage the expansion of qualified and fiscally viable minority partners.

In essence, one of Northwoods roles is to help expand opportunities to others.

9.8.3 DESCRIBE WHAT YOU BELIEVE TO BE THE ADVANTAGES OR DISADVANTAGES OF USING SUBCONTRACTORS.

The advantages:

- It makes sense to subcontract to meet the goals if a firm does not have the specific expertise
- The main contractor can focus on what they do best
- Great for a “one-off” need or specialization
- It may cost less for a subcontractors specializing in a specific skill to carry out a segment of the work
- The contractor has reduced overhead (labor cost, insurance obligations)

The disadvantages:

- The main contractor loses total project control and must work diligently to manage risk
- Subcontractors may not meet schedules or quality requirements
- Coordination of tasks with a subcontractor can be difficult
- Subcontractor may not appreciate the main contractors business culture and thus may lack the motivation and commitment of permanent staff
- May be possible threats to confidentiality, if applicable

9.9 TECHNICAL INNOVATIONS

9.9.1 DESCRIBE HOW YOUR ORGANIZATION HAS KEPT UP WITH TECHNOLOGY DURING THE PAST THREE YEARS IN THE AREAS OF:

CMS PLATFORMS

Northwoods develops the Titan CMS platform, so the vast majority of our solutions are built on this platform. However, being a full service software solution provider, our custom services group has implemented solutions on or integrated with the following platforms: WordPress, SiteCore, Endeca, and SharePoint. In addition, our Titan CMS product team regularly reviews features in other CMS platforms such as ocPortal, Joomla!, and concrete5 as part of our competitive analysis process.

Northwoods is in the process of moving shared hosting Titan CMS instances to the Azure Cloud environment and is currently assessing the benefits of developing and offering a platform services (PaaS) Titan CMS in the Azure Marketplace. We understand that is not suitable for all clients, so have intend to continue supporting Titan CMS in a traditional infrastructure for the foreseeable future.

WEBSITE/DATA SECURITY

Website and data security has always been a priority for Northwoods. Northwoods encourages our clients to implement security scanning for their websites such as McAfee SECURE or Rapid 7 NexPose or a product of their choosing. Northwoods developer best practices are designed to ensure our development team does not introduce code exposing client sites to:

- Cross Site Scripting
- SQL Injection
- Click Jacking
- Sensitive Data Exposure

We understand that few things are more publicly embarrassing or damaging to an organization than a hacked website, especially if that hack results in stolen sensitive data. Northwoods works with its clients to perform a security risk assessment whenever their website is expected hold or collect sensitive information and derives an action plan to secure that data.

To protect against the continual barrage of vulnerabilities (think POODLE, Shellshock, and HeartBleed), Northwoods keeps software and firmware patched to the latest version and monitors security forums, news, and other outlets to remain aware and able to take proactive steps when a threat is exposed. When appropriate we disable or remove weak or outdated protocols such as SSLv3 and RC4 ciphers.

While Northwoods' has never received a report of Titan CMS being compromised, we do have an action plan to track down the attacking parties, repair damaged data and compromised web pages, and seal the site against further attacks.

SITE SEARCH

Titan CMS provides a wide range of search options. Metadata search allows Titan CMS editors to carefully tailor the terms and keywords applicable for a given page.

The powerful dtSearch engine provides enterprise-level search functionality, indexing pages and files (like PDFs, Word documents, etc.) alike, incorporating grammar and language elements into searches, and providing relevancy rankings to results.

Smart Search allows CMS editors to customize searches, guiding users to specific highlighted content.

Segmented Search lets searches span multiple types of data and multiple search engines, consolidating relevant results from across the site into a single experience.

Data List and Filter Block searching provide robust searching of smaller subsets of data, like product catalogs.

Recently, Northwoods is evaluating Azure Search as a possible replacement for dtSearch.

In addition, we've developed an alternate Google Search Appliance Search block to the Titan dtSearch block for our clients with Google Search Appliances.

SEARCH ENGINE OPTIMIZATION

Northwoods Digital Strategy (DS) team is constantly staying informed on the latest trends and updates as they relate to Google's search algorithm and industry best practices for SEO. Members of the team can regularly be caught reading industry publications such as Search Engine Watch, Search Engine Journal, MOZ and others to stay current.

Our digital strategy team members can be found at conferences on SEO and digital marketing, they are as likely to be speaking at them as sitting in the audience. Northwoods educates the general public and our clients through our workshops on SEO, Content Marketing and Social Media.

Our DS team members pride themselves on understanding the latest SEO implementation techniques such as schema.org, meta-data generation/implementation, Google My Business, Google Places (local SEO optimization), Bing Webmaster Tools, Google Search Console, and many others.

We have Certified Google Analytics Professionals on-staff whose primary function is to provide our clients up-to-date information on the latest in SEO/SEM/Social and Content Marketing trends. These same professionals develop and teach the curriculum we provide on our series of workshops here at Northwoods on topics such as "SEO in 2016 and Beyond", "Google Analytics", "Social Media – Doing it Right" and "Kick-starting your Content

Marketing Strategy”. We also blog frequently on trends, direction and best practices with related to search, social, content marketing and domain authority.

SEO, Back-linking, content marketing and social media are integrated more than ever before. Since the major Hummingbird update several years ago, SEO has morphed from a focus on keywords to a focus on genuine, authentic and authoritative content.

Social channels allow organizations to amplify content. Content Marketing allows you to target specific influencers and online “watering holes” with relevant and authoritative content. Search engine result pages (SERP) now integrate social channel content into search results. Understanding all aspects of SEO is imperative to today’s digital marketing.

Titan CMS has always been SEO friendly, supporting page meta, friendly URLs, canonicalization and providing our clients the tools to build great content from day one. Recent additions have been the SEO Meta-Data Import/Export and Document Alias features which make it easier for Titan CMS authors to maintain search optimized pages.

AUDIO/VIDEO DELIVERY

Northwoods has years of experience in handling all aspects of video production for web sites including recording and editing the video, optimizing video for web playback (in multiple formats), and video hosting.

Recording and Editing

Our team of professionals can help you with all aspects of video production, including:

- Contracting with professional videographers
- Writing copy
- Organizing an appropriate and compelling background setting
- Producing video
- Editing the raw footage into one or more final videos

Video Optimization

No matter how good your raw video footage is, if it is not optimized properly, the end user experience will be poor. HTML 5 video elements allow a single video rendering to provide the optimal format for your viewing device.

Streaming and Hosting

Northwoods has experience with a wide range of hosting options tailored to each client’s needs and budget. These options include:

- Streaming video from a Content Distribution Network (CDN) such as Amazon S3

- Placing content at a streaming provider like YouTube or Vimeo
- Directly hosting video content in our Titan CMS

The Titan CMS content editor provides a plug-in for adding video to your site from wherever you choose to host it. While the plug-in was originally designed to use Adobe Flash Player with QuickTime support for iOS, Titan CMS owners can expect future versions of Titan to offer support for HTML 5 video elements.

MAPPING TECHNOLOGIES

Titan CMS integrates with several mapping technologies. The Titan Data Management System (DMS) can store geographic location data, and provides native support for proximity searching.

This makes it easy to create an interactive experience allowing users to search for dealers, schools, doctors, or anything else near a given location. Titan's DMS Data List block allows a wide range of additional filters to be combined with proximity searches, giving users a quick and intuitive interface for finding the most relevant locations in a given area.

Titan's extensible architecture works with a wide range of geographic data providers, including Google Maps and Bing Maps. With the latest version of Titan CMS, users provide locations in a familiar format (like a street address and zip code), and Titan takes care of the heavy lifting of geocoding that address to a latitude and longitude and plotting it on a map.

USER-CUSTOMIZED CONTENT AND WIDGETS

The Titan CMS provides a number of solutions for user-customized content and widgets.

In addition to standard CMS block types such as FAQ, Freeform, Forms Editor, and Listing/Filtering blocks; Titan provides both a Raw HTML block and Application block editors. The Raw HTML block is typically used to drop JavaScript snippets or iframes onto a page to integrate 3rd party widgets.

With Titan CMS v6.7, JavaScript page snippets are being introduced to provide content authors additional support for managing inline JavaScript code to the page.

The Titan Application block supports executing user-developed server-side code or screen scraping from user applications by simply providing the URL to the user application. The screen scraping is designed to both pull information from and push information to user applications through HTTP POST and GET requests. This means it can support user applications that require end-user input.

In addition, Titan Pre and Post Meta-tag support at the Theme and Layout level allow Titan CMS users to easily apply their own JavaScript libraries or 3rd party code snippets across entire content site or just specific areas of a site.

DATA AND/OR CONTENT APPLICATIONS

In the latest versions of Titan CMS, our innovative Data Management System provides a whole new level of support for data and content applications.

Entire data management applications can be built on top of the Titan CMS framework with little to no backend application development.

- The Data Schema Builder allows creation of a relational data structures for housing your specific data schema.
- Data Templates allow you full control over the listing and detail display of the data on your websites using XSLT, JavaScript/jQuery, and CSS.
 - For clients with backend .NET development staff, the Data Templates also support building custom processors to further enhance data listing and details (i.e. use SKUs to pull in pricing from external ERP system).
- Data Editors allow management of data for given Data Schemas
 - The self-generating Workstation Data Editor interfaces allow management of the data given a defined structure.
 - The flexible Display Side Data Editor support allows creation of user-friendly, in-line data entry interfaces for use on the website display side.
- Data Import/Export features allow pulling data in from external systems or exporting to flat-file for import back into external systems or simple bulk management using Excel or Access.

MOBILE/WIRELESS TECHNOLOGIES

When a new mobile app is developed, we target support for the top 90% of OS versions for a given platform in order to develop an app that is supported by the largest user group possible. Our app development team readily accepts and overcomes the challenge of the developing for the latest mobile OSs while ensuring the new app continues to work with the most prevalent legacy OSs in the wilds.

We have incorporated new features such as analytics, device testing labs, and push notifications into the apps we build as they become available from the operating system providers (Apple, Google, etc.), and integrate mobile app development topics into our regular developer meetings to discuss new and emerging technologies.

SERVICE ORIENTATED ARCHITECTURE

Northwoods Titan CMS product and custom solutions are designed using a Service Oriented Architecture (SOA). Business logic is exposed via Windows Communication Foundation (WCF) SOAP and RESTful services. The approach ensures our applications can support a variety of device interfaces and supports integration with other applications organizations may use.

The Northwoods development team regularly evaluates and learns new technologies to determine their appropriateness for our solutions. Recently the team has shifted to MVC and Microsoft's WebAPI for custom solutions as well as designing applications for Azure's Platform as a Service (PaaS) environment.

Our team regularly integrate with other SOA based API offerings for third parties applications like SendGrid, Google Search Appliance, Google Maps, Atlassian's JIRA, and SalesForce. We have developed solutions using numerous industry standard protocols such as oData, OAuth, and SAML.

SEPARATION IN CONTENT AND DISPLAY LOGIC

Separation of Content and Display Logic ties directly into our SOA design patterns.

Titan CMS maintains a clean separation from data, business logic, and display logic.

It is critical to being able to push the Titan CMS content to various channels. Whether it be a traditional web browser, mobile browser, mobile application, or 3rd party application, we take steps to ensure that the content entered into Titan CMS can be mined independent of the Titan display layer.

Recently, we've developed mobile applications to pull data from a provider directory managed in the Titan Data Management System for use by physicians for patient referrals. This same data is used to hold an online provider directory available to the general public. Each application has its own user interface built on completely separate technologies that consume the data they require from the same Titan CMS data repository. Each application requires a subset of the complete data set as the information available to physicians has overlap with that available to the general public but each have their own set of application specific data requirements.

SECURITY

Our concern for security, especially in light of several highly publicized cyber-attacks over the last few years, extends to several areas:

- Protecting our internal corporate network from a wide variety of attack vectors using the latest security hardware and software
- Maintaining regular software security patches on all systems
- Disabling use of weak SSL ciphers and protocols
- Employee security education, emphasizing situational awareness and caution, especially regarding attempts to gain access to our systems through *Social Engineering*.
- Limiting access to sensitive systems and data
- Never storing unnecessary sensitive data
- Securing access to all systems

E-COMMERCE AND PAYMENTS

We have a number of clients who require eCommerce integration.

For those clients, we typically integrate the eCommerce package of their choice with Titan CMS. Titan's flexible block architecture allows us to easily expand functionality.

Most eCommerce implementations, however, simply leverage the Titan CMS application block or an iFrame to provide a "window" to the functionality provided by the 3rd party eCommerce package.

However, for clients preferring a shopping experience that seamlessly integrates with their Titan CMS site or who cannot find an eCommerce package that suites their needs, members of the Northwoods custom services group have the experience and background required to develop a PCI compliant eCommerce solution based on their specific needs.

Our team is up to date on the PayPal APIs and has implemented integrated solutions using PayPal Payments Pro.

In section 9.10, we illustrate an example of the data model backing such a solution.

Recently, Northwoods product team has been vetting various eCommerce packages including AspDotNetStorefront, nopCommerce, OpenCart, PrestaShop, and Magento for a potential eCommerce module to be made available with the Titan CMS product.

Any package we choose will be fully extensible and supported in the Azure Cloud.

SOCIAL MEDIA INTEGRATION

At Northwoods, our Digital Strategy Team is on top of the latest social media trends and best practices in audience engagement. If they aren't busy reading the latest on SEO trends, we'll likely find them with a copy of Social Media Examiner, Social Media Today, Simply Measured, Buzz Sumo, or other publications.

As regular social media and digital marketing conference attendees, they also provide education to the general public and clients through our social media workshops. The workshops are part of a series of workshops that includes SEO content marketing and other digital marketing strategies.

When implementing social media strategies for our clients, it's about more than just likes, shares and retweets.

We focus on a comprehensive social strategy that integrates other digital marketing efforts and is aimed at amplifying brand messaging and content while driving engagement and website traffic.

ADA BEST PRACTICES

We have found ADA compliance to be a highly subjective and constantly moving target, as each of our clients with these concerns has a different perspective on how to accomplish the intent of the legislation.

The overriding consistent purpose of the ADA Compliance requirements is provide qualified individuals with disabilities equal access to programs, services, or activities without an undue burden.

One way we help our clients meet these requirements is to ensure that the website(s) have accessible features for people with disabilities using:

- Well organized content and navigation
- Easy to read and understand content (8th grade reading level, no jargon)
- Purposeful and informative content
- Few distractions or moving/flashing elements
- Visual contrast between text and page backgrounds
- Alternative navigation techniques, other than using a mouse
- Descriptive images
- Transcripts for video and audio

9.9.2 DESCRIBE HOW YOU IDENTIFY AND EVALUATE THE EFFECTIVENESS AND APPLICABILITY OF EMERGING TECHNOLOGIES TO MEET CLIENT NEEDS.

When choosing emerging or existing technology for use in our solutions, we look at market penetration for the technology, longevity of the company behind the technology, our client's experience and/or ability to successfully adopt and integrate the technology into their business processes, and the ability of our staff to implement solutions on the technology in a cost effective manner.

We also consider existing relationships and agreements our client may have with technology vendors that can be leveraged.

When adopting new technology in our Titan CMS product, we also take into consideration the impact on our existing client base and weigh the benefit of the technology against the additional hardware and/or software costs our clients may incur when upgrading their Titan CMS instance

9.9.3 DESCRIBE HOW THE COMPANY PROVIDES STRATEGIC DIRECTION ON IMPLEMENTING NEW TECHNOLOGY. PROVIDE IMPLEMENTED EXAMPLES, INCLUDING TEXT, SCREEN SHOTS AND LINKS.

Northwoods is a full service solution provider. As such, we have staff dedicated to customer relations, business analysis, design, branding, digital strategy, software architecture, systems integration, and quality assurance. Throughout your project, we assign the appropriate expert to work with you to answer questions and guide you toward the best solution.

Not only do our experts provide our clients strategic guidance on the latest trends and best practices for their websites, but Northwoods offers regular workshops to share our expertise with the Milwaukee area communities (<http://learnatnorthwoods.com/main.htm>).

Workshops expose the local technology community to trends in various technology subject areas. Below are just some examples:

- SEO - <http://learnatnorthwoods.com/SEO-2016>
- Google Analytics - <http://learnatnorthwoods.com/analytics>
- Mobile Apps – Why, How and More than You Think - <http://learnatnorthwoods.com/main/mobile-apps/why-how-and-more-than-you-think>
- Introduction to Digital Strategy - <http://learnatnorthwoods.com/Milwaukee-Seminars-Workshops/introduction-to-digital-strategy.htm>
- Email Marketing Strategies - <http://learnatnorthwoods.com/Milwaukee-Seminars-Workshops/email-marketing-strategies>
- Intranet Best Practices: Strategy & Design - <http://learnatnorthwoods.com/intranet>

A brief sampling of Strategic Direction Northwoods has provided to integrate New Technologies for our clients:

Example 1

Client with mailing lists exceeding 90,000 users came to us because their existing system could not support the number of e-mails being sent and they were being incorrectly black listed by recipient ISPs.

We recommended they use the SendGrid API in conjunction with Titan CMS's Data Management System to manage their lists and send mailings.

By importing their users into the Titan CMS and leveraging the robust tagging system for classifying users, the client was able to provide their non-technical users with straight-forward list management system with capabilities to export lists to the SendGrid application for Newsletter creation and mail handling.

Northwoods custom services team was able to implement a solution that seamlessly exported the list and dropped the user directly into the Newsletter management screen bypassing several complexities of the SendGrid API.

User-Specific Managed List View

Current Mailing Lists

[New List](#)

List Name	Actions
Principals - Elementary	Edit Delete Create Newsletter Clone Export List
Principals - Secondary	Edit Delete Create Newsletter Clone Export List
Principals and Secretaries	Edit Delete Create Newsletter Clone Export List
Schools	Edit Delete Create Newsletter Clone Export List
Synod DVD	Edit Delete Create Newsletter Clone Export List
Tech Update - Elem Schools	Edit Delete Create Newsletter Clone Export List
Tech Update - Parishes	Edit Delete Create Newsletter Clone Export List
Tech Update - Schools	Edit Delete Create Newsletter Clone Export List

<< Prev Page 2 of 2

Create New List

Tags

- A-Z
- County
- District
- Grade Level
- Language
- School
- School type

County

- ALL
- Dodge
- Fond du Lac
- Kenosha
- Ozaukee
- Racine
- Sheboygan

Selected Values

County

- Milwaukee

Individuals (205 recipients)

Search for individuals that have at least one selected value for each classification

Search for individuals that have at least one of the selected values

Tags

- School Groups
- SFS Groups
- Social Action
- Special Needs
- State
- Students
- WMM

Special Needs

- ALL
- Camp Counselors
- Persons
- Retreatants

Selected Values

Special Needs

- Campers

AND belong to the following:

Tags

- Parish
- School

Available Values

Selected Values

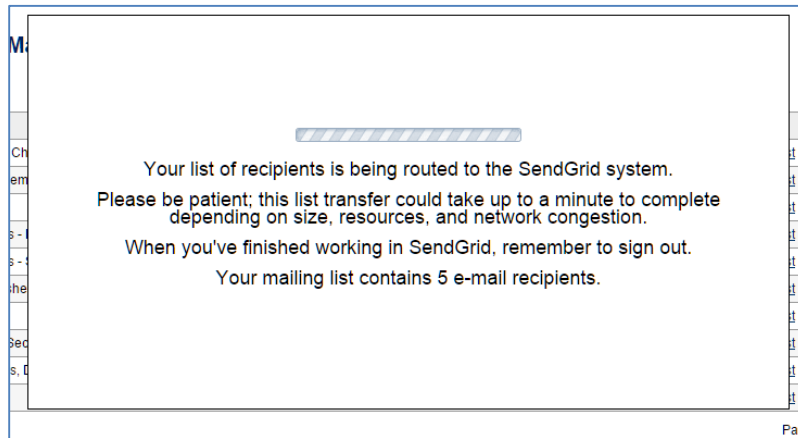
Recipient list summary:

schools: 55 recipients
 individuals: 205 recipients

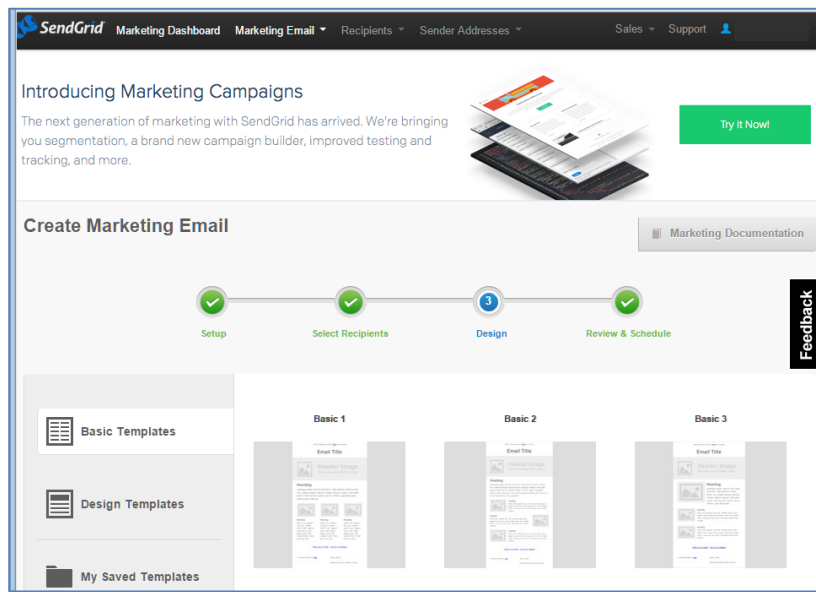
total: 260 recipients

[Edit Mailing List](#) [Save](#) [Cancel](#)

The SendGrid hand off



SendGrid Newsletter Builder



Recently, SendGrid changed their interfaces resulting in the solution no longer taking users to the Newsletter management screen but to a more generic dashboard resulting in a more difficult to navigation solution.

The client contacted SendGrid but didn't have the technical understanding of the solution to get past level one support.

Northwoods assigned a technical lead to assist. By clearly communicating the original solution dependencies and recommending a solution path, the Northwoods technical lead quickly bypassed level one support and negotiated with the SendGrid team to assign a development team to provide a solution for our mutual client.

Northwoods considers clients our partners and regularly assist them in navigating technical challenges with their other product vendors and technology service providers.

Example 2

An existing Titan CMS client needed an eCommerce solution to market and sell their products online.


We worked with them to select a reliable and affordable eCommerce platform with an extensible API allowing for the development of a shopping cart based on Titan CMS application blocks.

The PayPal Payment Pro API fit the bill and we developed the necessary shopping interfaces to fit their unique product requirements within their budget.

While budgetary constraints restricted design, an aesthetically acceptable solution was provided that has served the company's business objectives. They continue to be a valued Northwoods client.

Add Product

Add Dispenser



Dispenser

Choose Options

Fountain of Youth Upgrade Program

This is a Fountain of Youth upgrade program replacement dispenser. It is replacing the following dispenser serial # [help](#)

NOTE: Free sauce and chip racks are only available for dispensers that are not being upgraded as part of the Fountain of Youth upgrade program.

Free Sauce


To get you started with your _____ dispenser, we will send you free cheese or chili sauce for the dispenser you are leasing. Please indicate your selection below.

Case 1:
 ▼

Free Chip Rack

I would like to receive a _____ chip rack with my dispenser lease. To qualify for this offer, I have verified that my distributor carries _____ chips, and I agree to only use _____ chips in my Gehl's chip rack. I have selected the rack I would like to receive below.

2.0 - Three Tier Rack



Cost: **\$249.00*** [Add to Cart](#)

* Notice: For Canadian orders, there is an additional fee for taxes, duties and customs fees of \$105 per dispenser and \$25 per chip rack.

Important: You must check with your distributor to make sure they carry the correct pouch size for your dispenser. Not all distributors carry all pouch sizes.

Cart

Shopping Cart
Please review your cart contents below.

Description	Unit Price	Qty	Total
 Dispenser Discount Pricing Details	249.00	1 <input type="text"/> <input type="button" value="v"/> Modify / Remove Add Similar	249.00
Cheese Sauce 2.0, Queso Blanco, 6/60 Oz Case, Item #320001	Free!		Free!
2.0 - Three Tier Rack	Free!		Free!


* Notice: For Canadian orders, there is an additional fee for taxes, duties and customs fees of \$105 per dispenser and \$25 per chip rack.

Sub Total: \$249.00

Have a Coupon Code?
If you have a coupon code, please enter it below.
 Coupon Code:


Secured Checkout Page

Billing Information NWS 1572 E. Capitol Drive Shorewood WI, 53211 USA modify	Shipping Information NWS 1572 E. Capitol Drive Shorewood WI, 53211 USA Ph: + Fax: E-mail: ericw@northwoodssoft.com modify
--	--

Description	Unit Price	Qty	Total
 Dispenser Discount Pricing Details	249.00	1 <input type="text"/> <input type="button" value="v"/> Modify / Remove Add Similar	249.00
Cheese Sauce 2.0, Queso Blanco, 6/60 Oz Case, Item #320001	Free!		Free!
2.0 - Three Tier Rack	Free!		Free!

Sub Total: \$249.00
 Shipping & Handling: \$0.00
Total: \$249.00

Credit Card Information



Card Type:

Card Number:

Expiration: CVS: [help](#)

Agreements

To receive a dispenser through online program, you must review a copy of the [LEASE AGREEMENT](#) and agree to the terms and conditions listed below. Once you have placed your order, a copy of the lease agreement will be sent to you via e-mail with your order confirmation. The order confirmation will include the conditions listed below.

I certify that I am an authorized representative of NWS and that NWS is bound by the terms of the [LEASE AGREEMENT](#) as a "Lessee" ([modify company name](#))

OR

I certify that I am leasing this equipment as an individual and am personally bound by the terms of the [LEASE AGREEMENT](#) as "Lessee"

I acknowledge and agree that any equipment ordered on this site is leased to me on the terms and conditions explained in the [LEASE AGREEMENT](#), and that _____ will remain the sole owner of this equipment.

I acknowledge and agree that ONLY _____ sauces can be used in my dispenser.

I understand that ONLY _____ chips may be used with any racks included in this order.

I have verified with my distributor that it carries the correct pack size of the _____ sauces I need.

Please provide the name of your distributor:

Have a Broker Representative?
 Referring Broker:

9.10 DATABASE DESIGN AND MANAGEMENT

9.10.1 DESCRIBE AND PROVIDE EXAMPLES OF YOUR ORGANIZATION'S EXPERIENCE IN THE FOLLOWING:

LEGACY DATA CONVERSION

Northwoods has extensive experience migrating data into Titan CMS from other systems.

Titan CMS provides import/export features for content pages and files as well as a suite of options for importing/exporting data from the Titan Data Management System.

The Titan CMS Task Scheduling Engine allows for regularly scheduled imports ideal for integrating with other systems that manage information required by your websites.

While much of Northwoods Data Conversion work has revolved around importing content, files and users from our clients legacy website systems into Titan CMS; Northwoods' Custom Services Group has designed and implemented numerous non-CMS systems for clients. Often these solutions require converting data from a pre-existing system into the newly developed system.

Pension records, historical financial performance records, physician data, product data, activity and registration records, and membership data are just some examples of legacy conversions we've performed to replace legacy systems.

Clients on recent versions of the Titan CMS have successfully leverage the Titan Data Management system to bridge the gap between legacy systems and their Titan CMS hosted websites.

DATA SCHEMA. INCLUDE INFORMATION ON BOTH THE CREATION OF DATA SCHEMA AND THE EVALUATION OF EXISTING SCHEMA IN ORDER TO RECOMMEND CHANGES FOR EFFICIENCIES.

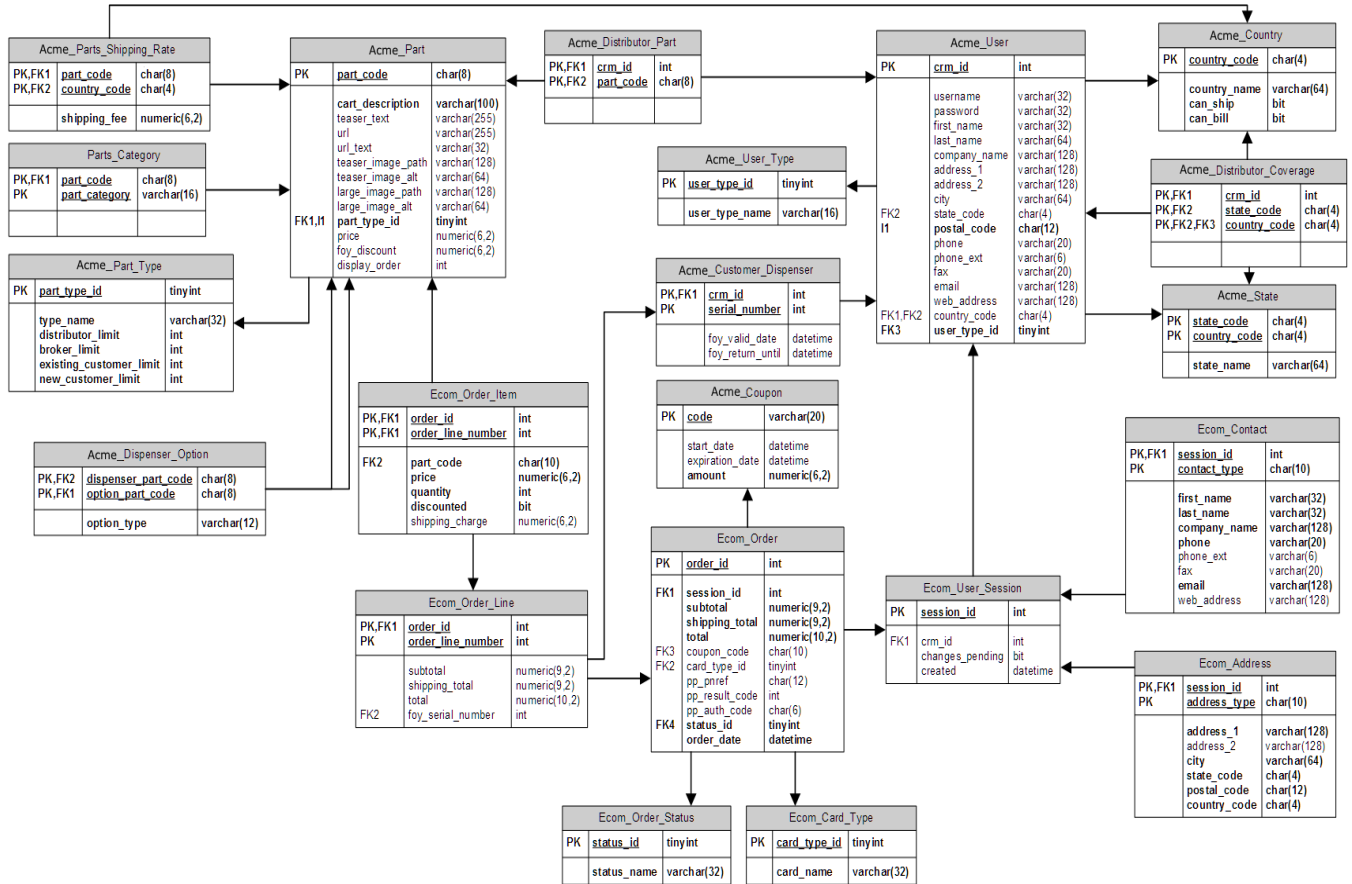
Titan CMS is primarily a database application.

The core database is comprised of 111 tables with the Titan Data Management System (DMS) allowing additional dynamically generated and managed tables to be added by clients.

As such, Northwoods developers are well versed in Microsoft SQL and database architecture. For custom solutions, Northwoods typically creates Entity Relationship Diagrams (ERD) using Visio or SQL Management Studio.

The following database schema and mapping document sample was designed for a client of Northwoods to support the client's online product catalog and distributor locator. The tables prefixed with "Acme_" represent tables designed to integrate with the client's existing inventory management system (actual client name removed for confidentiality).

“Ecom_” prefixed tables support a Titan CMS eCommerce module:



Naming Standards

All tables whose name starts with “Acme_” are tables populated and maintained through external processes developed by Acme Foods, Inc. All other tables are populated and managed by the Acme’s online web application unless otherwise noted.

Part Information

These tables are populated and maintained by Acme’s staff. They provide the information on parts, parts pricing, and other part related information from Acme’s ERP system.

Acme_Part

The following table contains all parts to be made available to the website. Acme populates this table from their ERP system on a regular basis.

Field Name	Description
part_code	Contains internal Acme's part number. Used as primary key for parts table so must be unique. Field is referenced in the following tables: Acme_Parts_Category, Acme_Parts_Shipping_Rate, Acme_Dispenser_Options, Acme_Distributor_Parts, and EcomOrderItem. EcomOrderItem does not enforce referential integrity to ensure the original part_code tied to an order is maintained even if entries are removed from the Acme_Parts table
cart_description	Contains description for the part that the end user will see in their shopping cart. Support HTML content
teaser_text	Contains description displayed to the end user on the product listing pages. Supports HTML content.
url	URL intended to allow provision of a path to the product detail page. If the detail page exists within the same domain as the ecommerce application, the path may be relative
url_text	The text to be displayed for the URL specified in the "url" field. If this field is empty, the "url" field value will be used as the link text.
teaser_image_path	URL to teaser image for part. Image is displayed in the product listing and cart pages. Recommend all teaser images be entered with the same dimensions to ensure a consistent appearance.
teaser_image_alt	Used as the ALT text on the teaser image.
large_image_path	URL to large part image. Image is displayed in the product listing and cart pages when the user clicks an option to enlarge the image specified in the teaser_image_path. Recommend all large images be entered with the same dimensions and be the same as the teaser image only larger.
large_image_alt	Used as the ALT text on the large image.
part_type_id	Foreign key value from Acme_Part_Type table. Indicates whether the part is a dispenser, sample, dispenser part, etc. Value is entered in the Titan workstation "Product Type" field on the properties tab of the Product Listing Pages (see Acmes Phase III SRS 3.1.1.2.2)
price	Numeric field supporting values up to 9,999.99. Provides the part's unit price without tax or shipping
foy_discount	Numeric field supporting values up to 9,999.99. If the part can be discounted as part of the Fountain of Youth program, the amount of the discount for the item is provided in this field.
display_order	The order the part appears in relation to other parts on the part listing pages.

Acme_Part_Type

The following table contains the information specific to each part type. Provides the name of each type of part as well as the purchase limits by user type for each part type.

Field Name	Description
part_type_id	Primary unique key for the table. Referenced by the Acme_Parts table.
type_name	String used to define the type of part. The initial values are expected to be 'Sample', 'Dispenser', 'Part', and 'POS'
distributor_limit	Maximum number of this part that can be ordered online by the Distributor user type. 0 indicates the Distributor user type cannot order any of these parts
broker_limit	Maximum number of this part that can be ordered online by the Broker user type. 0 indicates the Broker user type cannot order any of these parts.
existing_customer_limit	Maximum number of this part that can be ordered online by the Existing Customer user type. 0 indicates the Existing Customer user type cannot order any of these parts.
new_customer_limit	Maximum number of this part that can be ordered online by the New Customer user type. 0 indicates the New Customer user type cannot order any of these parts.

The ERD & Data Mapping documentation Northwoods produces for projects gives the stakeholders, developers, database administrators and anybody else working on the project a clear picture of the database schema and how it is used.

In addition to developing new schemas to support our client solutions, Northwoods clients often turn to us for assistance with legacy or “orphaned” applications where the original developers are no longer available or are unable to meet client expectations. Often, failure to meet expectations revolves around poor database performance.

In order to work effectively with Titan CMS and ensure custom schemas designed for customers do not adversely impact the system, Northwoods provides developers regular training in database analysis, design and performance troubleshooting.

All developers are expected to be able to write efficient t-SQL, read execution plans and use SQL profiler properly to troubleshoot issues.

Senior developers are further expected understand how to use system and dynamic views to find resource bottlenecks and optimize indexes and other data structures to maximize performance and scalability.

MANAGEMENT OF LARGE DATABASES THAT SUPPORT A WEBSITE. INCLUDE AN OVERVIEW OF THE COMPLEXITY OF THE SITE SUPPORTED BY THE DATABASE AND THE NUMBER OF RECORDS MANAGED.

Content management systems, by their nature, hold large amounts of data. Often they are one of the largest OLTP databases for an organization. For an enterprise content management system like Titan CMS, it is common to see databases over 10 GB in size with some exceeding 100GB in size. Large Titan CMS instances are typically made up of thousands if not 10's of thousands of content pages and 10's of thousands of files. In addition, Titan CMS has a Data Management System (DMS) which provides an infrastructure for creating client-specific data structures to host any type of data our clients wish to manage. This data shares the same versioning and auditing features as built-in Titan CMS data structures (i.e. Pages and Files) along with self-generating interfaces for managing the data. Data import interfaces are also provided since often client data is managed outside of Titan and imported for use on client websites.

Large Titan instances typically serve between 300,000 and 1.5 million visitors per month. From a front-end website perspective, the Titan CMS is designed such that a site running on a 100GB database will perform as well as a site running on a 10MB database. Milwaukee County is familiar with the size and complexity of their own Titan CMS instance so we'll provide examples illustrating other large Titan CMS instances:

Example 1:

A well-known Wisconsin-based manufacturing client of Northwoods has an instance comprised of 55 websites hosting nearly 10,000 content pages and 50,000 files. The instance houses over 10 million rows producing 23GB of data. The database Websites consist of a portal, multiple intranets, micro-sites for marketing campaigns, departmental websites, business division websites, and sites for acquired brands. All sites are integrated with an enterprise-wide single sign-on solution. The manufacturer's Titan hosted public sites average 400,000 to 500,000 visitors per month. In addition, the intranet sites serve over 11,000 employees.

Example 2:

An academic medical institution with 27 websites hosting nearly 30,000 content pages and over 40,000 files. The instance houses 82 million rows producing 42GB of data. Websites consist of a portal, intranet, and departmental websites. In addition to content page and files, the Titan Data Management System hosts an employee directory and publically accessible provider locator which host nearly 15,000 data records. The institution is globally recognized site averaging between 350,000 and 400,000 visitors per month.

Example 3:

A financial client who leverages Titan's Data Management System (DMS) to provide end users and advisors financial data about their investments. The instance houses 10 million rows producing 7.5GB of data. On initial launch, over 100,000 historical financial records were loaded into the Titan DMS spanning 11 data sites representing various types of financial information. The records are presented in charts and downloadable as Excel files across multiple sites representing their variety of brands. While not a particularly high traffic site nor large database, it is an example of how the DMS built into Titan can house a large number of historical records for distribution to a client's target audience.

Not only do these examples illustrate the ability of the Titan CMS to support large, complex solutions and high load, but also its ability to service diverse client base.

9.10.2 DESCRIBE (NOT MORE THAN 2 PAGES) YOUR BEST EXAMPLE OF A CMS OR DATABASE DESIGN PROJECT OF SIMILAR SCOPE, INDICATING HOW YOU ADDRESSED THE FOLLOWING:

As a Titan CMS vendor, we have many examples of CMS implementations of similar scope. A portal with departmental websites and an intranet are not uncommon.

The County is aware that Northwoods, as the incumbent, implemented the existing Milwaukee.gov portal over a decade ago so can be confident in our ability to deliver.

However, we'll take this opportunity to share a more recent project example as a lot has changed in 10 years. Our responses below reflect our recent work for the **Milwaukee Public Schools (MPS) websites**.

ADMIN UX DESIGN

The administrative user experience for Titan CMS is not specific to a given project since all solutions share the same Titan CMS administrative interface. The Titan CMS provides a user friendly dashboard system that allows content authors and CMS admins to quickly find information relevant to their tasks.

Upon successful login to Titan's administrative workstation, the user is presented with the dashboard system. The system is composed of blocks, or widgets, that help the user monitor content-related activities, forms activity, user account activity and file usage. This dashboard is flexible and allows users to tailor their widget display to widgets they feel most important to their tasks. In addition, the widget framework is extensible allowing additional widgets to be developed and integrated as needed.

As the user advances beyond the dashboard, they find that the user interface (UI) design is replicated whether you are maintaining a page of content, a file, a user account or a data record. Our research and experience tell us consistency is key to ensuring a usable administrative interface. The action toolbar at the top of the interface and the center vertical toolbar (edit tabs) provides user-friendly icons and tool tips. Throughout the interface, question icons appear next to individual fields that require additional explanation.

USER PROFILE MANAGEMENT- ADMINISTRATIVE AND VARIOUS LEVELS OF ROLES AND RESPONSIBILITIES.

Titan CMS provides several levels of administrative users for accessing the following Titan CMS modules: Commenting Workstation, Smart Search, Titan Administration, User Management, and Web Content Management.

Webmasters – The webmaster has access to all of the modules in the Titan workstation. In addition, the webmaster is the only user with access to the webmaster publish feature. This feature allows direct publishing of content overriding the defined approval work flow.

CMSAdmins – CMS Admins have access to all functionality within the Content Management, Titan Administration, and Commenting Workstation modules.

ContentAdmins – Content Admins have access to all functionality within the Content Management module and Commenting Workstation.

SmartSearchAdmins – Smart Search Admins have access to the Smart Search module where they can manage keyword results from website searches.

UserAdmins – User Admins have access to the User Management module where they maintain user accounts. They also receive account-related email notifications.

Everyone – A group used to represent everybody in the system including anonymous web site users which are represented by a “public” account who is a member of the Everyone group.

Titan CMS provides a separation of security for the workstation and security for the end user websites (Workflow vs Display Security). Both types of security are defined around users and groups. Often display security requires the ability to segment content by department or region or any number of other criteria used to define a target audience for content. Titan allows defining arbitrary security tags such as Departments, Regions, Affiliations, etc.

SEO CONSIDERATIONS

For MPS, they leverage Titan’s highly configurable workflow engine to ensure content meta-data follows best practices before an item is published to their public website. The Titan workstation’s SEO Properties view provides MPS with a display of specific SEO fields associated with their pages, files and data items. This includes: Page Title, Meta Description, Meta Keywords and Page URL. In addition, Titan provides a download SEO properties to Excel feature allowing users to manage in a familiar, simple to use tabular interface. Once updated, the Excel file is re-imported to apply changes.

When a client creates a new Titan website, we want to ensure that the old site’s link juice is not lost. 301 redirects can be created at the page level by using Titan’s Document Alias functionality. In addition, if legacy URLs are changed for consistency or user friendliness, the Document Alias feature automatically registers the legacy URL. This functionality is critical to ensuring you are providing a single, preferred URL to your content pages. This is called canonicalization and is an important part of a successful SEO strategy.

INLINE EDITING

The Tian CMS Data Management System (DMS) feature allows users with no Titan CMS training to edit data associated with DMS data records. DMS data records represent homogeneous, structured data such as contacts, events, products, etc. We use data editor templates to present and allow editing of the data. Since Titan’s DMS allows representation of any type of data, we’ve leveraged the Titan CMS Forms Editor to allow highly configurable forms for managing the DMS records. In addition, the flexible architecture supports creating multiple versions of the forms supporting managing a subset of the data record based on user role.

Beginning in January, 2016, MPS will be using display side editing to update information originating from language and interpretation translation requests. These users have a very specific task of providing proper translations for existing data. There is no desire to provide them access to the entire Titan CMS workstation nor

the training on the Titan CMS content management interfaces making the Titan DMS inline editing a perfect choice.

Non-Titan DMS content is maintained within the workstation but the preview feature allows you to confirm the presentation of your content prior to publishing.

IMAGERY AND MULTIMEDIA

We believe in optimized images for a better user experience. Imagery, used wisely, communicates your message. MPS is an excellent example of the use of imagery on web and mobile devices. Their home page rotation banner is kept fresh with imagery changing on a daily basis. Photos have also been incorporated into their megamenu (e.g., Employment megamenu features the Wisconsin Elementary Teach of the Year).

MPS has videos available at MPS OnDemand and YouTube. They selectively embed the YouTube code on their site to feature a video within their content.

When multiple videos are focused on a topic, they provide links to their videos on YouTube. In addition, Titan CMS supports the playing of .mp4, .flv and .webm videos that reside in the Titan file piles.

FLEXIBILITY TO MINE FIELDS THAT ARE CUSTOMIZABLE

MPS leverages the Titan CMS Data Management System (DMS) to house the school, job opening, events and news data required for their websites. Much of this data comes from other systems with pre-existing data schemas.

This is where the Titan DMS shined. Instead of having to re-massage data from each of these systems to fit into Titan, we simply recreated the structures to support storing the information required based the source system schemas. We then used the Titan Task Scheduler Engine to import data from the external system into the Titan DMS.

Once in the Titan DMS, this data can be searched and displayed through both the Titan CMS display and workstation interfaces.

In addition, Titan's ability to export data to flat file combined with the fact that Titan DMS mimicked the source system allows much less effort in moving the data between systems.

While not currently leveraged, Titan's service oriented architecture means the data is readily available through Titan services. Of particular benefit, should the need arise, to real-time integration with a 3rd party system.

ARCHIVING DATA

MPS had very specific compliance and public records requirements for retaining older content on their site, which had to be balanced against a desire to ensure that users could easily find current, relevant content. We were able to efficiently leverage Titan CMS to regularly archive older content, automatically archiving certain types of content past a certain age. The archived data remained publicly available and fully searchable, while the primary navigation and search features of the site excluded archived content.

On a more technical level, data is archived and backed up regularly. All content is stored in a SQL Server database, and MPS easily extended existing data archive and backup policies to include Titan CMS.

DOCUMENT TREE MANAGEMENT

Titan's File Piles provide a robust set of document management features. While the data is stored in a hierarchical manner and the workstation supports tree view navigation, the Titan Content Picker has also been designed with a robust search engine allowing relevant documents to be located through keyword searching in addition to the more traditional tree view document management interface.

Titan's flexible browse view architecture allows content authors to customize which fields they see when listing documents. In addition, knowing where files are being used in the system is an important aspect of document management. Titan's Where Used feature allows you to see where files are being referenced throughout your CMS system.

Finally, documents support the same extended properties as content pages. This means you can provide SEO friendly meta for your documents as well as leverage Titan's powerful Tagging technology to allow document filtering in combination with keyword searching.

CACHING/LOAD BALANCING

Titan CMS supports load balancing and separation of user interface, business logic, and data layers for improved performance and availability. MPS implemented two load balanced environments, creating one server farm for internal traffic and a separate farm for external traffic. Each environment had multiple web and application servers, with traffic distributed among them via round robin. Titan's load balancing requirements are relatively simple, and MPS was able to leverage existing networking appliances to build out the virtual networks and infrastructure needed to distribute the load.

Titan CMS has several internal caching mechanisms designed to guarantee high performance, and different types of caching can be employed based on specific business needs. Titan's flexible navigation caching, for instance, significantly reduced the load time of pages on the MPS site, while still maintaining the ability to rapidly create, move, and secure content. As another example, MPS targeted certain high-visibility pages (like their home page) for some additional caching mechanisms, maintaining the power of Titan's data-intensive Data List feature but minimizing the overhead required.

SCALABILITY – ADMINISTRATIVE, FUNCTIONAL, LOAD AND GENERATION

Titan CMS is built for scalability.

Within a load balanced environment, additional web or application servers can be easily added to an existing pool. The administrative overhead of scaling is dependent on the provisioning process in place in the hosting environment. In virtualized environments, for instance, a VM can just be replicated and added to the existing server pool. However, Northwoods generally places an emphasis on sufficiently provisioning infrastructure in advance.

As part of the Discovery process for the new MPS site, Northwoods looked at existing usage data and expected growth and recommended resources that could sufficiently handle the load, and performed load testing to confirm those recommendations. As a result, MPS has never needed to scale their environment up or out.

SPEED/LOAD TIMES IN THE CMS

Titan CMS is designed to perform well in any properly provisioned environment, emphasizing short load times.

The database is highly indexed and optimized to deliver content quickly; caching mechanisms and efficient code on the application and web layers help speed up several common operations; and static assets served to web browsers are designed to be compact, resulting in shorter download and load times.

After disappointing speed with their previous CMS, MPS chose Titan CMS in part because of its superior load times, and review of their analytics data shows that speed has remained consistently fast since launch.

DATA MIGRATION / EXPORTING OF DATA

Titan CMS features a wide range of tools for importing, exporting, and integrating content and data.

MPS was able to use Titan's native data import tool to migrate their existing event calendar to Titan.

Additional integrations pull data from third-party systems into Titan CMS, such as basic information for all the schools within the system (from a custom database system) and available job opportunities (from a CRM).

Titan can import content and data in a range of formats, from CSV to XML; files can be imported en masse just by pointing Titan to a folder.

Additionally, content, whether a single page or an entire site, can be quickly and efficiently exported to XML.

9.11 WEB APPLICATION DEVELOPMENT

9.11.1 PROVIDE URL'S OR SCREEN SHOTS OF YOUR TWO BEST EXAMPLES AND A ONE PAGE SINGLE- SPACED DESCRIPTION FOR EACH URL OR SCREEN SHOT OF HOW YOUR ORGANIZATION APPROACHES ITS WORK AS IT PERTAINS TO WEB APPLICATION DEVELOPMENT FOR THE FOLLOWING:

EXISTING WEB PROPERTIES THAT INCORPORATE CMS

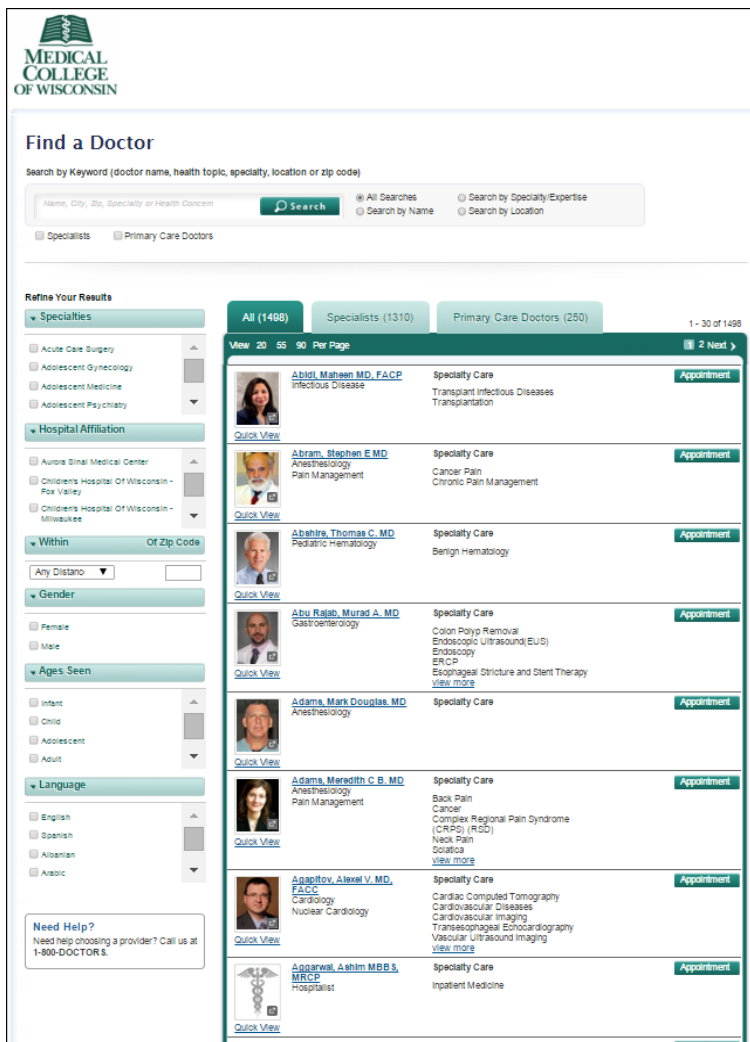
Medical College Wisconsin – Online Physician Directory (Find A Doctor)

The Medical College of Wisconsin (MCW), a long time Titan CMS client needed to provide the ability for partner healthcare providers such as Froedtert and Childrens' Hospital to present MCW doctors in a consumer way within their Titan CMS. This powerful tool solves a very significant problem discovered in our usability studies.


Our focus groups identified that most people searching for a healthcare provider were frustrated with many online Physician Finders. This was due to missing and inconsistent data found in existing doctor finders.

The Find A Doctor application provides a better User Experience by providing:

- More consistent and intuitive behavior of the various fields and buttons
- Better, more consistent result sets
- More complete physician and clinic/center information
- Search by health topic with key word matching to medical terms
- Data updated from existing systems with webservice




Individual Doctor Profile Page



MEDICAL COLLEGE OF WISCONSIN

Find a Doctor [Start a New Search](#)

[Return to Search Results](#)
[Print Entire Profile](#)
[Bookmark Profile](#)
[Share This Page](#)




Mary Burke, MD
Staff Physician

"I am passionate about women's health and women's advocacy, in general. I believe that good health is a cornerstone for reaching one's goals and potential. My specific areas of interest are obstetrics, adolescent gynecology and minimally-invasive gynecologic surgery."

[View Video](#)

Profile Contents

- [Overview](#)
- [Clinic Locations](#)
- [Video](#)
- [Biography](#)



Request Appointment Online

New & Established Patients Call
(414) 833-8944


Established Patient Appointments
(414) 434-8333

Overview

<p>Specialties</p> <ul style="list-style-type: none"> • Obstetrics and Gynecology <p>Board Certification</p> <ul style="list-style-type: none"> • Obstetrics and Gynecology 	<p>Hospital Affiliations</p> <ul style="list-style-type: none"> • Froedter Hospital <p>Patient Ages Seen</p> <ul style="list-style-type: none"> • Child • Adolescent • Adult • Senior <p>Languages Spoken</p> <ul style="list-style-type: none"> • English 	<p>Diseases & Conditions</p> <ul style="list-style-type: none"> • Abnormal Pap Smear • Abnormal Vaginal Bleeding • Pregnancy 	<p>Treatments & Services</p> <ul style="list-style-type: none"> • Contraception Management • High Risk Obstetrics • Hysterectomy Alternatives • Low-Risk Obstetrics • Minimally Invasive Surgery • Women's Health Services
---	---	--	---


Clinic Locations

Lincoln Avenue Health Center
11211 West Lincoln Avenue
West Allis WI 53227
Phone: (414) 434-8333
[Get Directions](#)



Video

Dr. Mary Burke, obstetrician/gynecologist



Biography

Education / Training

- Doctor of Medicine - Tufts University School of Medicine - Boston, MA (1998)
- Residency in Obstetrics and Gynecology - University of Colorado Health Sciences Center - Denver (1999-2003)

Vollrath, LLC

<http://vollrath.com/>

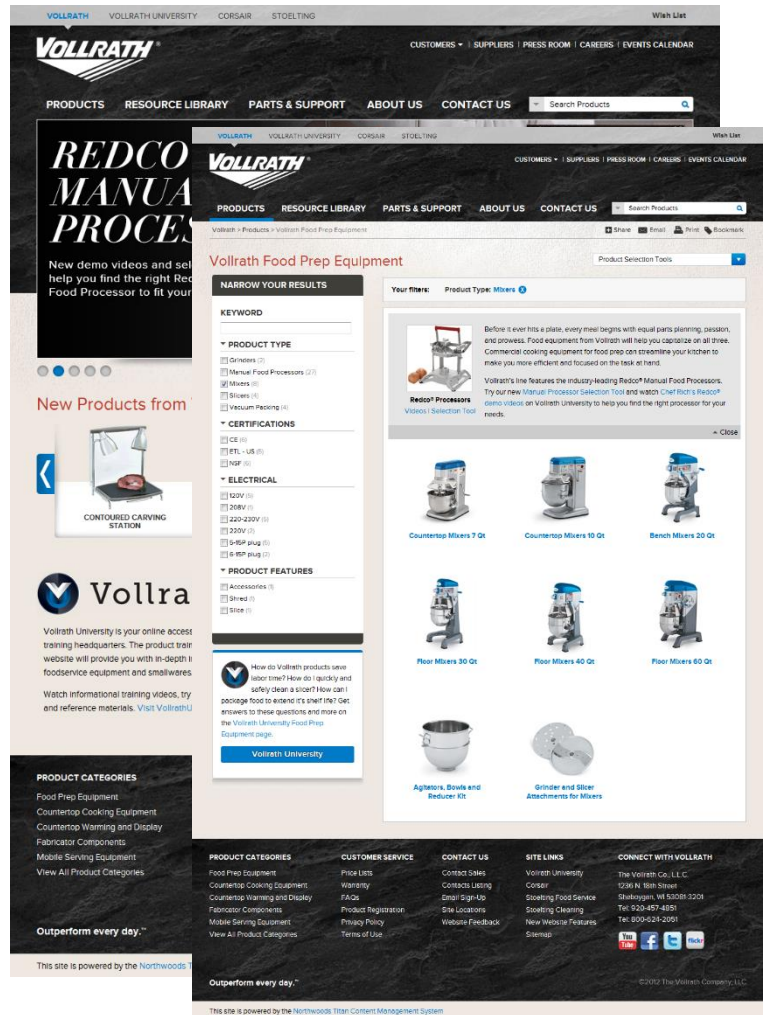
Vollrath, a long time Titan CMS client wanted to transition their products and product literature into a digital setting. There were several issues related to this transition, including consistent and accurate data, product literature, and output channels.

- **Consistent and Accurate Data:** Vollrath maintained data about their products and literature in a variety of formats. They needed to access data on various products quickly and efficiently and get this information to the customer.
- **Product Literature:** Supporting product literature was something many customers wanted to access. However, one product literature page oftentimes corresponded to multiple products in the catalog.

There was no way for Vollrath to connect these products to the correct product literature, without individually connecting the literature to each product. This made the documentation repetitive and confusing for the user.

Northwoods developed and incorporated a Product Information Management (PIM) system with Titan CMS to pull and manage product data from the existing ERP system to feed the public websites for their various product lines.

This web app incorporated into Titan CMS brings a wide variety of Vollrath products to the digital world and is much more timely, accurate and comprehensive than the previous printed catalog. This approach including the ERP integration makes for efficient and cost effective updates to the website.



The screenshot displays the Vollrath website's product selection interface. The main navigation includes 'PRODUCTS', 'RESOURCE LIBRARY', 'PARTS & SUPPORT', 'ABOUT US', and 'CONTACT US'. A search bar is located in the top right. The main content area is titled 'Vollrath Food Prep Equipment' and features a 'NARROW YOUR RESULTS' sidebar with filters for 'PRODUCT TYPE', 'CERTIFICATIONS', and 'ELECTRICAL'. The main product grid shows various equipment models such as 'Countertop Mixers 7 Qt.', 'Countertop Mixers 10 Qt.', 'Bench Mixers 20 Qt.', 'Floor Mixers 30 Qt.', 'Floor Mixers 40 Qt.', 'Floor Mixers 60 Qt.', 'Agitator, Bowl and Reducer Kit', and 'Grinder and Slicer Attachments for Mixers'. A 'Vollrath University' section is also visible, offering training resources.

EXTRANETS

Extranet - Briggs & Stratton Corporation - The Power Portal

Briggs & Stratton has been a client of Northwoods for over 12 years. The Power Portal serves Dealers, Distributors, Suppliers, OEMs, and Vendors. When we began work on The Power Portal, Briggs & Stratton was happy to get 100 logins a week. Today, the Power Portal gets that many logins in an hour.

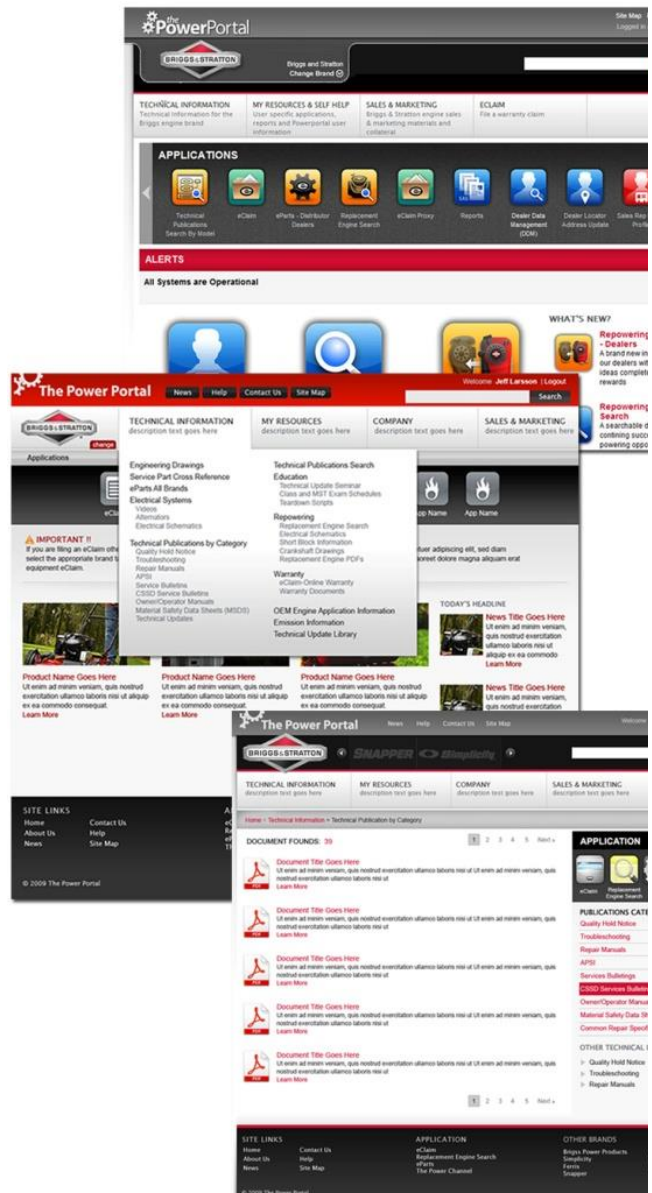
FACTS

- 90,000+ secured users
- 29 applications available via single sign-on – many written by Northwoods
- 16 different languages
- Supports 14 different brands

RESULTS

- Warranty claims – 93% of claims processed through the Power Portal (\$15,000/month savings)
- Learning Management System (Increased number of trained dealers while decreasing travel expense as well as time away from dealer.)

"What used to take us many hours or days; such as changing viewing security for a region of the world, now takes a few minutes. We can also deploy a complete new site from nothing to production in less than a day including pages, images and product information. We have seen the performance of the software decrease our maintenance time and effort by at least 80%."
- Bruce Radcliff, Briggs & Stratton Corporation



Extranet - Snap-on, Incorporated - Division: Equipment Solutions (EQS)

EQS designs and produces customized service facilities providing comprehensive end-to-end extranet support for auto service departments starting with initial consultation, collaborative planning with architects and contractors, through installation and long term support.

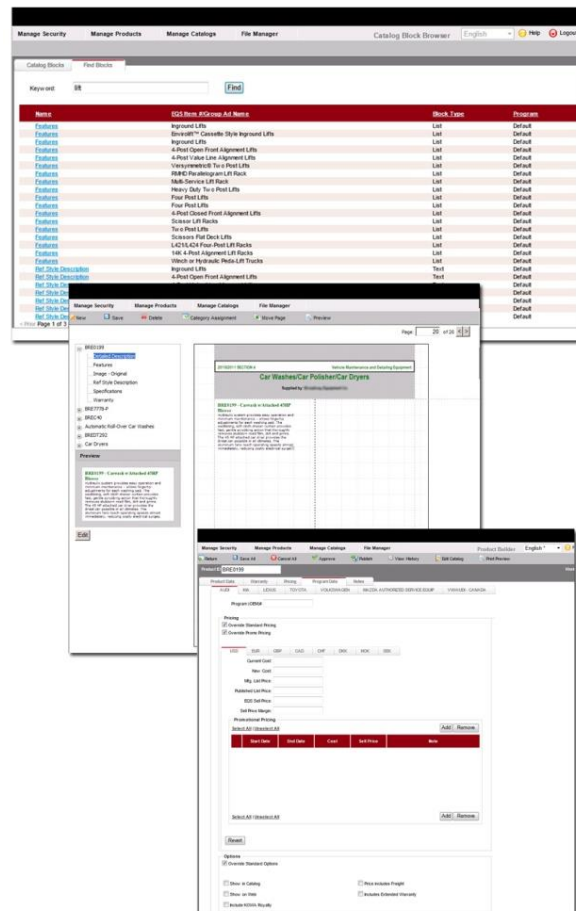
The Extranet product management process needed streamlining, so Northwoods replaced a very costly and time intensive manual process for creating, updating, and publishing on-line and print catalogues

Northwoods' Extranet Solution

- Web-based submission of product specs, marketing media, and pricing programs for resale
- Feeds online and print-based catalogs
- “Virtual” catalog pages for laying out submitted product information to export to InDesign
- User Interface Design, Information Architecture
- Project Management, Implementation
- Workflow automation
- Multiple languages and currencies

Resulting Successes & Benefits

- Streamlined process of collecting, maintaining, and publishing information for thousands of products
- Dynamic feedback to Snap-on, Suppliers and OEMs
- Elimination of much of the communication overhead required for product maintenance



“The Northwoods catalogue process management system continues to provide us multiple avenues of cost savings and efficiencies.” - Paul Langhenry, Director of Product Management, Snap-on Equipment Solutions

Snap-on, Incorporated - Corporate Division

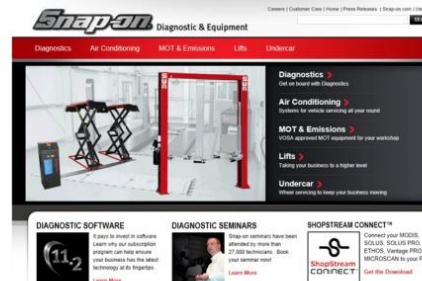
Snap-on Incorporated is the leading global innovator, manufacturer and marketer of tools, diagnostics, equipment, software, and service solutions for professional users. Snap-on’s many divisions and profit centers needed a tool and partner to consolidate web site management, application integration, and improved user experience to build the brand.

Northwoods' Solution

- Implementation of Titan CMS (Content Management System) to manage all major websites, intranet, and extranets on one platform
- Back-end programming to integrate database applications seamlessly
- Digital Strategy, User Interface Creative Design, and Information Architecture
- Dozens of author/editors with the capability to manage content in the workstation
- **Supports 8 divisions and 35 websites representing intranet and extranet sites, including international versions of the sites**
- Over 5,000 registered users, Intranets and Extranets
- Industry standard technologies make it easy to provide features and designs
- Titan CMS enterprise Content Management System to build websites, Intranets, Extranets, Portals and powerful online applications
- Programming and related consulting for complex data application integrations

Resulting Successes & Benefits

- Ease-of-use to update and create website and pages
- Flexible and scalable to meet all web-based needs
- Security and Workflow have enabled the distribution of authorship across the enterprise



9.11.2 IN YOUR DESCRIPTION, ADDRESS THE STRATEGY, TECHNOLOGIES, METHODOLOGIES AND APPROACH TO PRIORITIZATION OF TASKS, STAFF ASSIGNMENTS, TRACKING, STATUS UPDATES AND TRAINING AS THEY PERTAIN TO MAINTAINING AND ADVANCING WEB PROPERTIES.

The Northwoods team is made up of web developers, designers, digital strategists & client service professionals. We purposely find individuals with different backgrounds in order to support the various projects we build.

The project leaders, Account Directors (AD), have a unique set of skills: They are Project Managers, Information Architects, and Digital Strategists all in one. In addition our ADs' are experts in the following:

- Usability / Information Architecture Strategists
- Search Engine Optimization (SEO) Experts
- Content Developers
- Writers
- Social Media Experts
- Account Coordination

Northwoods builds applications using Microsoft Technologies and web standards. A few of these include:

.Net C#	.Net Mobile Apps	CSS 2.0, CSS 2.1, CSS3
ASP.Net	JavaScript	XML / XSL / XSLT
SQL 2008, 2012, 2014	HTML 5.0, XHTML	SAML

Northwoods developers meet each week to complete code reviews, discuss projects, challenges, and solutions, and receive updates on the latest technologies.

These meetings also include presentations of new features, tool sets, or trends found by any of the development staff.

As Titan CMS architects create new functionality, they meet with the development and client services teams to explain the new features.

The entire staff of Northwoods also meets once a month to demonstrate our latest software applications and websites and detail how they were built.

Our culture is bathed in continuous learning. It's a core part of who we are and why smart people like to work here.

Northwoods runs all of its projects through our Director of Production. He keeps an eye on the productivity of all of our staff from Account Directors to interns to ensure that all of our projects run efficiently and on budget.

When a new project is assigned, the Director of Production and other team members look at several factors when determining the team. These include:

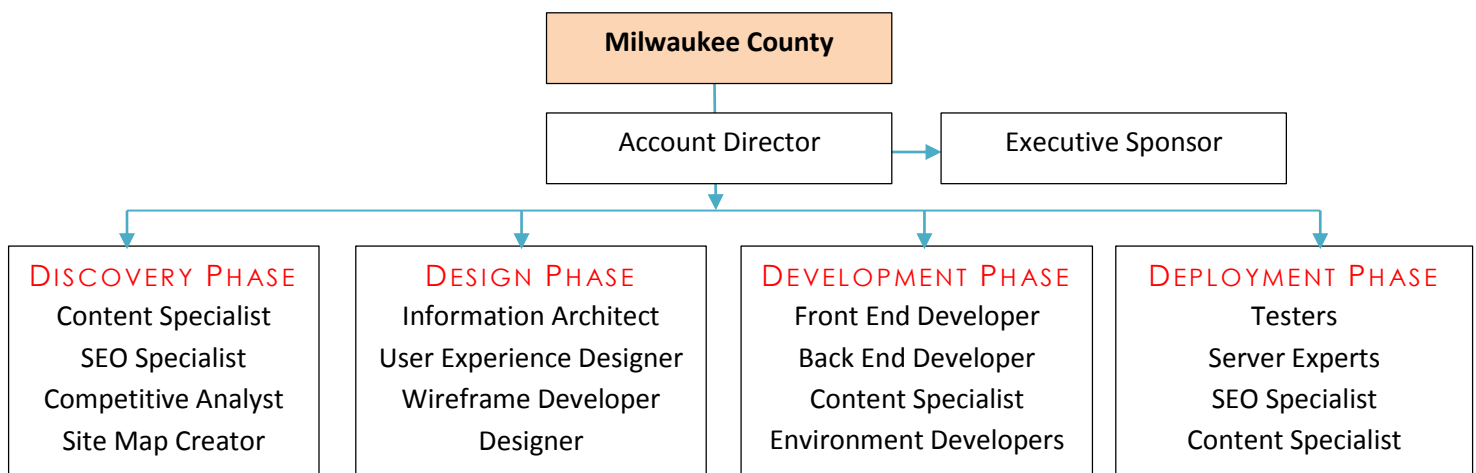
1. Project Scope - Is the project data driven? Content driven?
2. The Client – Does the client “get it?” Is s/he technical? Marketing type? Bears fan?
3. Project Timeline – When does the project need to be done?
4. Staff Availability – Not only today, but next year? Do we need to keep the same staff on the project long term?

Every implementation project is assigned an Account Director (AD) who leads the day to day management with our clients.

The AD is supported by a team of individuals based on the needs of the project. This could include digital strategists, information architects, SEO experts, content developers, and front and back end developers.

The faces of the team changes as the project progresses to completion.

The implementation team would likely look like this for your project:



Our project management process has four phases: Discovery, Design, Development, and Deployment. All projects begin with a kickoff meeting.

Account Directors, who are what others call Project Managers, are tasked with the following:

- Defining and maintain accurate projects scope
- Consulting, guiding, and engaging stakeholders
- Ensuring development of detailed requirements with clear visual assets to aid understanding
- Ensuring development of clear and measurable projects goals and objectives
- Gaining and maintaining ownership and support from senior management
- Scheduling skilled and experienced resources for specific tasks
- Developing good reporting arrangements and decision-making discipline
- Developing good understanding of required projects activities, roles, and responsibilities
- Managing risks, issues, and decision-making
- Tracking tasks with Jira as the primary tool set
- Conducting Status Updates
- Training clients on specific features rolled out to them

Project management (PM) is the key to project success and ensures that a project is on-time and on-budget. All projects are affected by three opposing forces: scope, cost, and schedule. Unexpected changes to any of these factors can affect quality.

We use Jira for issue tracking and have made a major investment in modifying Jira to tailor to our needs. If project appropriate, we allow clients full access to relevant Jira project and issue data.

We also train our clients to do as much as they can on their own. We do this through several methods including:

- **Learn at Northwoods** – Our staff offer 14 different workshops on a wide range of topics. Each year we create new classes like [Kick Starting Your Content Marketing](#) and [SEO in 2016 and Beyond](#) to bring our clients up to speed with the latest developments. All workshops are completely FREE!
- **One on One Training** – If you are more of a hands on learner, Northwoods also offers one on one workshops that are four hours in length. The first two hours cover how to set up Google Analytics in a manner that best fits your needs. The second two hours cover how to study the analytics and develop ways to respond to improve your website’s content. We adjust the course materials to fit your own strengths and weaknesses.
- **Titan CMS Training Curricula** - <http://titancms.com/Services/TrainingClasses.htm>

Northwoods conducts browser, operating systems (OS), and device testing as part of every website project.

It is important to understand that the identification and elimination of all display anomalies that may occur in the various combinations of browsers, operating systems, and devices is not always cost effective or achievable given the existence of thousands of combinations of browser versions, OS versions, service packs, hot fixes, browser plugins, and known and unknown browser bugs.

Northwoods works to identify and eliminate as many display anomalies as possible for the combinations listed below, but do not in any way guarantee or imply that all issues can or will be solved.

We test the new websites on the most used browsers, OS, and devices for display consistency and make best efforts to remedy issues within the hours we allocate to a project.

Browser / OS / Device Testing

Browser/Version	OS	Device
Internet Explorer (Latest release)	Window 7, Windows 8.1	Desktop, MS Surface, Win Phone Microsoft Surface Windows Phone
Edge (Latest release)	Windows 10	Desktop, MS Surface, Win Phone
IE 9 and IE 10	Windows 7	Desktop
Google Chrome (Latest release)	Window 7, Windows 8 Android 4.0 (Smart Phone) OS X (10.9 or greater)	Desktop Tablet Smart Phone
Mozilla Firefox (Latest release)	Window 7, Windows 8 Android 4.0 (Smart Phone) OS X (10.9 or greater)	Desktop Tablet Smart Phone
Apple Safari (Latest release)	iOS 8.1 (Phone, iPad) OS X (10.9 or greater)	iPad 3,4, Air, Mini iPhone 4,5,6, Mac Desktop

9.12 REFERENCES

9.12.1 PROVIDE THREE REFERENCES OF CLIENTS FOR WHOM THE AGENCY HAS PERFORMED BRANDING, WEBSITE DEVELOPMENT AND DESIGN, AND THE SERVICES REQUESTED IN THIS RFP.

REFERENCE # 1

Milwaukee Public Schools

Amy Kant, Webmaster

kantam@milwaukee.k12.wi.us

414-870-8902

Denise Callaway Reistad, Director Community Engagement

callawde@milwaukee.k12.wi.us

414-475-8650

REFERENCE # 2

SKYGEN USA

Christine Rudella, Marketing Director

christine.rudella@skygenusa.com

262-834-4145

Jennifer Behnke, Marketing Manager

Jennifer.behnke@skygenusa.com

262-834-4152

REFERENCE # 3

Vollrath Company, LLC

Cathy Fitzgerald, MarCom Director

cfitzgerald@vollrathco.com

920-459-5266

Meriel Adricula-Radloff, Digital Marketing Manager

meriel.radloff@vollrathco.com

920-459-5252



NORTHWOODS WEB SOLUTIONS

COST PROPOSAL

MILWAUKEE COUNTY RFP # 98150016

COUNTY-WIDE BRANDING, WEBSITE DESIGN & DEVELOPMENT

Prepared by:

Tom Pappas
Business Development

Phone Number: 414-914-9143
Support Line: 414-914-9300

January 8, 2016

CONTENTS

10. Cost Proposal	3
Branding.....	4
Design	5
Development/Programming.....	6
Account Service	7
Training.....	8
Licensing Fees	9
Technical Assistance	9
Testing	10
Implementation.....	11
Installation.....	13
Any other costs (please specify).....	14
Hourly fees for additional services available, but perhaps not critical to implementation of this project.....	15
The sum total of the cost proposal should be the total cost of the project to Milwaukee County, with no exceptions.....	16

10. COST PROPOSAL

Cost Proposal Intro

Our technical response to this RFP illustrates Northwoods' extensive capabilities and while we have the ability to provide a budget friendly solution as presented in Northwoods' "Credibility and Budget Response for Milwaukee County Website Project" proposal dated May 19, 2015; we can appreciate that after more than 10 years with the same functionality and aesthetics, the County is seeking a more inclusive overhaul of their web properties. Northwoods has the distinct advantage of being able to focus funding for the project on digital strategy, design, and interactive features for the sites versus installation, configuration, licensing and training. Our proposed solution provides the following:

- Comprehensive Digital Strategy for Portal, Public, and Intranet websites
- Digital Strategy for Select Department Website (Board of Supervisors)
- Discovery, including User Focus Groups/selective stakeholder interviews, for all web properties
- Overhauled Information Architecture for all web properties
- Responsive Template for Portal, Public, and Intranet websites
 - Design reflecting County branding requirements
 - Intranet Dashboard
- Responsive Template for Departmental websites
 - Design supporting Individualized Department branding without loss of overall County brand
 - Support for Departmental Intranet seamlessly integrating with County Intranet.
- Personalization w/Gated Content
- User Feedback (Commenting, Rating, Blogging)
- Activity Management
- Social Media Integration
- Titan v6.7 Upgrade
- Comprehensive Account Management, Project Management, and Testing
- Migration/Optimization of Legacy Content for Responsive Templates
- Training and Technical Assistance
 - Managing Responsive Content
 - Converting Legacy Content for a Responsive Site
 - Search Engine Optimization/Search Engine Results Page (SERP) Recommendations
 - Social Media Integration
- Strategical and Technical Support
 - Content Migration Plan
 - Communications Plan (social media, email alerts, etc)
 - Launch Preparation and Execution

Northwoods is confident the scope and cost provided reflects a solution that will better serve the residents, businesses, and county staff while portraying an image of Milwaukee County we can all be proud of!

BRANDING

Portal, Public, Intranet (www.milwaukee.gov, county.milwaukee.gov, mcintranet.milwaukee.gov)

Digital Strategy / Discovery

- Goal Identification
- Content Inventory
- Analytics Analysis
- Competitive Analysis
- User Interviews/Focus Groups (to include representatives from each department)
- Keyword Research
- Recommendations for Pages, Keywords, and SERP Optimization
- Local SEO Audit
- Content Marketing and Social Media Assessment

Hours / Cost: 115 / \$16,675

Digital Strategy for Board of Supervisors Departmental Site

Basic Digital Strategy / Discovery

- Goal Identification
- Analytics Analysis
- Keyword Research
- SEO recommendations for Pages, Keywords, and SERP Optimization
- Department Brand Identification

Hours / Cost: 25 / \$3,625

Total Branding Hours / Cost: 140 / \$20,300

DESIGN

Portal, Public, Intranet (www.milwaukee.gov, county.milwaukee.gov, mcintranet.milwaukee.gov)

- Information Architecture
- Wireframes
- Site Map
- Portal Comp and 2 revision sets (Milwaukee.gov)
- 2 home page comps and up to 2 revision sets suitable for County public and intranet (county.milwaukee.gov, mcintranet.milwaukee.gov)
- 3 interior page comps based on selected home page comp with up to 2 revision sets

Hours / Cost: 143 / \$20,735

Master Departmental Design Template

- Information Architecture
- Wireframes
- Site Map
- Comp based and up to 2 revision sets supporting Departmental branding while maintaining Portal branding
- 2 interior page comps and up to 2 revision sets

Hours / Cost: 108 / \$15,660

Board of Supervisors Departmental Site

- Custom color scheme
- IA/Site Map

Hours / Cost: 10 / \$1,450

Value-Add Options

- Information Architecture / Discovery / Requirements
 - Personalization w/Gated Content
 - User Feedback
 - Titan Activity Management
 - Social Media Integration

Hours / Cost: 13 / \$1,885

Total Design Hours / Cost: 274 / \$39,730

DEVELOPMENT/PROGRAMMING

While Titan CMS base included functionality covers a vast majority of features required for the County-wide Branding, Website Design & Development project, Northwoods believes the following value-add features are being included in the project to promote community, business, and staff engagement with the new websites.

Portal, Public, Intranet (www.milwaukee.gov, county.milwaukee.gov, mcintranet.milwaukee.gov)

- HTML/CSS cut-up of design comprehensives
- Implementation of JavaScript to support dynamic UI elements

Hours / Cost: 100 / \$14,500

Master Departmental Template Implementation

- HTML/CSS cut-up of design comprehensives
- Implementation of JavaScript to support dynamic UI elements

Hours / Cost: 80 / \$11,600

Value-Add Options

- Information Architecture / Discovery / Requirements
 - Personalization w/Gated Content
 - User Feedback
 - Titan Activity Management
 - Social Media Integration

Hours / Cost: 82 / \$11,890

Total Development/Programming Hours / Cost: 262 / \$37,990

ACCOUNT SERVICE

Portal, Public, Intranet (www.milwaukee.gov, county.milwaukee.gov, mcintranet.milwaukee.gov)

- Project and Account Management Services

Hours / Cost: 79 / \$11,455

Master Departmental Template Site

- Project and Account Management Services

Hours / Cost: 40 / \$5,800

Board of Supervisors Departmental Site

- Project and Account Management Services

Hours / Cost: 1 / \$145

Value-Add Options

- Information Architecture / Discovery / Requirements
 - Personalization w/Gated Content
 - User Feedback
 - Titan Activity Management
 - Social Media Integration

Hours / Cost: 24 / \$3,480

Total Account Services Hours / Cost: 144 / \$20,880

TRAINING

County Webmaster and various departmental Author/Editors are currently trained on Titan CMS and would need no additional training.

However, Northwoods will provide County content managers training specific to managing and maintaining site-specific features as well as six 90 minute monthly Best Practices Roundtable Sessions to be held either at Northwoods training center or a designated location at the County offices. Training will be relevant and customized for the county's specific websites with regards to managing responsive content, SEO properties, and other activities critical to successful management of the County's web properties.

Round Table Best Practice Sessions

- Preparation
- Facilitation

Hours / Cost: 13 / \$1,885

Portal, Public, Intranet (www.milwaukee.gov, county.milwaukee.gov, mcintranet.milwaukee.gov)

- Training/Documentation
 - Site Specific Configuration/Content Management

Hours / Cost: 6 / \$870

Master Departmental Template Site

- Training/Documentation
 - Setup and configuration of new department site off template
 - Site Specific Configuration/Content Management

Hours / Cost: 4 / \$580

Value-Add Options

- Training/Documentation
 - Personalization w/Gated Content
 - User Feedback
 - Titan Activity Management
 - Social Media Integration

Hours / Cost: 8 / \$1,160

Total Training Hours / Cost: 31 / \$4,495

LICENSING FEES

Milwaukee County and the City of Milwaukee currently share a Titan CMS Enterprise License

Cost: \$0

Total Licensing Cost: \$0

TECHNICAL ASSISTANCE

As a participant in Titan CMS Maintenance & Support, Milwaukee County currently receives:

- No-charge, unlimited support during regular business hours via email or phone regarding base Titan CMS questions/issues
- Rights to all version releases of Titan CMS

Post warranty, if questions/issues arise concerning non-base Titan CMS customizations, County hosting environment, design CSS/HTML, hooks to third-party applications, etc., there are four Service and Support options, each designed to address different needs: Retainer, Block of Hours, Time & Material, and Off-Hours Support. Northwoods will work with the county to determine which option will be appropriate.

Annual Titan CMS Maintenance and Support

Cost: \$10,000* annually

* Titan CMS Enterprise License Maintenance and Support of \$20,000 per year is split with City of Milwaukee. The current term is intact and runs 9/16/15 – 9/15/16. This would remain consistent

TESTING

Portal, Public, Intranet (www.milwaukee.gov, county.milwaukee.gov, mcintranet.milwaukee.gov)

- Quality Assurance Services
 - Unit Testing
 - Regression Testing
 - Bug Fixes

Hours / Cost: 83 / \$12,035

Master Departmental Template Site

The master departmental template is its own site, independent of the portal, public and intranet site. Because it will have its own unique theme, IA, features with similar testing requirements to the portal, public and intranet sites.

- Quality Assurance Services
 - Unit Testing
 - Regression Testing
 - Bug Fixes

Hours / Cost: 51 / \$7,395

Value-Add Options

- Quality Assurance Services (Unit Testing, Regression Testing, Bug Fixes)
 - Personalization w/Gated Content
 - User Feedback
 - Titan Activity Management
 - Social Media Integration

Hours / Cost: 25 / \$3,625

Total Testing Hours / Cost: 159 / \$23,055

IMPLEMENTATION

Portal, Public, Intranet (www.milwaukee.gov, county.milwaukee.gov, mcintranet.milwaukee.gov)

- Titan CMS Titan Administration Configuration (Themes, Content Sites, etc.) Dev
- Portal Content Build Out
- Public Site Content Build Out
 - Copying existing site structures and re-organization to reflect information architecture identified during Design phase. Titan URL Swapper maintains link of copied page to original allowing a swap of URLs once the new pages are completed.
 - Departments in Titan whose pages are not being migrated to the Master Departmental Template (i.e. departments other than Board of Supervisors) will be copied and live within the general Portal/Public/Intranet theme.
 - Migration and optimization of legacy content for responsive templates
- Intranet Site
 - Copying existing site structures and re-organization to reflect information architecture identified during Design phase. Titan URL Swapper maintains link of copied page to original allowing a swap of URLs once the new pages are completed.
 - Migration and optimization of legacy content for responsive templates will be delegated to County content managers

Hours / Cost: 139 / \$20,155

Master Departmental Template Implementation

- Titan CMS Titan Administration Configuration (Themes, Content Sites, etc.) Dev
- Content Build Out

Hours / Cost: 16 / \$2,320

Board of Supervisors Departmental Site

- Content build-out (based on estimate of 300 pages) (Production only)
 - Migrate department legacy content in accordance with new information architecture
 - Optimization of legacy content for responsive templates

Hours / Cost: 70 / \$10,150

Value-Add

- Migrate legacy events to Titan Activity Data Site

Hours / Cost: 4 / \$580



Total Implementation Hours / Cost: 229 / \$33,205

INSTALLATION

Installation activities include both Test and Production environments unless otherwise stated.

Portal, Public, Intranet (www.milwaukee.gov, county.milwaukee.gov, mcintranet.milwaukee.gov)

- Deployment
- Titan CMS Titan Administration Configuration (Themes, Content Sites, etc.)
- Site framework build out

Hours / Cost: 46 / \$6,670

Master Departmental Template Site

- Deployment
- Titan CMS Titan Administration Configuration (Themes, Content Sites, etc.)
- Template build out

Hours / Cost: 38 / \$5,510

Board of Supervisors Departmental Site

- Titan Administration setup and configuration tasks
 - Clone from Master Departmental Template
 - Apply Department Specific Branding Elements

Hours / Cost: 4 / \$580

Value-Add

- Deployment, Titan Setup and Configuration
 - Personalization w/Gated Content
 - User Feedback
 - Titan Activity Management
 - Social Media Integration

Hours / Cost: 12 / \$1,740

Total Installation Hours / Cost: 100 / \$14,500

ANY OTHER COSTS (PLEASE SPECIFY)

Titan V6.7 Upgrade

As part of this project, Northwoods is providing an upgrade to Titan version 6.7 at no additional cost.

Cost: \$0*

* Estimated annual upgrades costs vary depending on level of customization. However, similar Titan instances run \$5,000 to \$10,000

Departmental Sites

Basic Digital Strategy/Discovery*

- Goal Identification
- Analytics Analysis
- Keyword Research
- SEO - Recommendations for Pages, Keywords, and SERP Optimization

Hours / Cost: 20 / \$2,900 per Department (recommended, not required)

*NOTE: Basic Digital Strategy/Discovery assumes Portal, Public, Intranet Digital Strategy/Discovery effort has been completed. The information from the Portal, Public, and Intranet Digital Strategy/Discovery is required to support a successful Basic Digital Strategy effort for individual departments.

Basic Digital Strategy/Discovery is **recommended but not required** to migrate a departmental site.

Design

- Color scheme selection and CSS creation
- IA/Site Map

Hours / Cost: 10 / \$1,450

Installation

- Titan CMS Titan Administration Configuration (Clone Department Template Theme and Content Site)
- Apply appropriate CSS for color scheme
- Department Specific Configurations (Logo, search page, secured content login, etc.)

Hours / Cost: 4 / \$580 per department

Implementation, Testing and other Activities

The effort for implementation, testing and other activities related to migrating departments are directly tied to the number of pages being migrated as well as any custom functionality that may be required for the department. For example, the Sheriff's department may have different functionality requirements than the County Executive or Parks.

The Training, Technical Assistance, Departmental Template, and Departmental example (Board of Supervisors) will provide the County content management staff the tools necessary to successfully move departmental content into the redesigned websites independent of Northwoods.

Cloning Departmental Template site, adding logo, and applying desired color pallet may be sufficient for some departments. For larger departments or ones not yet in Titan, Digital Strategy/Discovery, Design and Installation services may be desirable.

Optional Per Department Additional Hours / Cost: 34 / \$4,930*

* Reflects effort for Basic Digital Strategy/Discovery, Design, and Installation. Implementation, Testing, Content Authoring and Entry services would be additional to be determined once Basic Digital Strategy/Discovery services are complete.

HOURLY FEES FOR ADDITIONAL SERVICES AVAILABLE, BUT PERHAPS NOT CRITICAL TO IMPLEMENTATION OF THIS PROJECT.

\$145/hr

THE SUM TOTAL OF THE COST PROPOSAL SHOULD BE THE TOTAL COST OF THE PROJECT TO MILWAUKEE COUNTY, WITH NO EXCEPTIONS.

<i>Service</i>	<i>Hours</i>	<i>Cost</i>
Portal, Public, Intranet <ul style="list-style-type: none"> • www.milwaukee.gov • county.milwaukee.gov • mcintranet.milwaukee.gov 	711	\$103,095
Master Departmental Template	337	\$48,865
Board of Supervisors Departmental Site	110	\$15,950
Value-Add Options <ul style="list-style-type: none"> • Personalization w/Gated Content • User Feedback • Titan Activity Management • Social Media Integration 	168	\$24,360
Round Table Best Practice Sessions	13	\$1,885
Total Cost to Milwaukee County	1,339	\$194,155

Since costs described under the “Any Other Costs (Please Specify)” section of this document are not required

Cost Proposal Addendum For expediency, we’ve included migration and optimization of legacy content for display in responsive templates for the Portal, Public and selected department site (Board of Supervisors). We understand the County may choose to further limit scope of the service we are providing to reduce project costs.

Attachment E
Northwood's EXECUTED, Finalized Statement of Work

Attachment E
Technology Policy

Attachment F
Personal Data Protection

(a) "County Personal Data" includes any information relating to an identified or identifiable natural person that is obtained by Contractor from County. "Processing" includes any operation or set of operations performed upon County Personal Data, such as collection, recording, organization, storage, adaptation or alteration, retrieval, accessing, consultation, use, disclosure by transmission, dissemination or otherwise making available, alignment or combination, blocking, erasure or destruction.

(b) Contractor shall view and Process County Personal Data only on a need-to-know basis and only to the extent necessary to perform this Agreement, unless otherwise instructed in writing by County. Contractor shall use appropriate technical and organizational measures to ensure the security and confidentiality of County Personal Data in order to prevent, among other things, accidental, unauthorized or unlawful destruction, modification, disclosure, access or loss of such County Personal Data. Contractor shall immediately inform County of any breach of this security and confidentiality undertaking, unless Contractor is prohibited from doing so by law.

(c) Upon termination of this Agreement, for whatever reason, Contractor shall stop the Processing of County Personal Data, unless instructed otherwise by County in writing, and these undertakings shall remain in force until such time as Contractor no longer possesses County Personal Data.

(d) Contractor understands and agrees that County may use Contractor's personal data ("Contractor Personal Data") as specified herein or elsewhere in communications to Contractor, Contractor's affiliates, employees or representatives. Such Contractor Personal Data may fall within the following categories of data: identity, photograph and contact information, information related to this Agreement and its performance (including, but not limited to, assignment, location, time, costs, and price), information related to Contractor's financial situation, and job qualifications of Contractor's employees. Contractor Personal Data will be used for purposes related to the selection of suppliers and to the performance of this Agreement, including, but not limited to, supplier and payment administration, task allocation, training, assessment of Contractor's performance under this Agreement, and any task orders, cost analysis, statistics, and the provision and control of access and use of County facilities and tools. Contractor Personal Data may be transferred to and stored in a global database and processed by County's relevant employees and suppliers. Contractor agrees that Contractor will comply with all legal requirements, including, but not limited to, obtaining the consent of the data subject, where required, prior to transferring any Contractor Personal Data to County. Thereafter, County will take appropriate measures to ensure that Contractor Personal Data is stored securely and in conformity with applicable data protection laws. In particular, County will provide data subjects with access to personal data relating to them as provided under applicable law. Requests for access, rectifying errors, and any objections shall be brought to County's attention by contacting the appropriate County Risk Manager.