



McCordsville, IN

RFP Website Design

Due date: August 25, 2023

Submitted by:
CORE Business Technologies



1 Cover Letter





August 23, 2023

Tim Gropp, Town Manager
Town of McCordsville
6280 West 800 North
McCordsville, IN 46055

Dear Tim,

Thank you for the opportunity to respond to the Town's Request for Proposal for Website Design. CORE Business Technologies (CORE) has carefully reviewed the Town's RFP and understands the purpose, scope, and requirements of the RFP. We are happy to share our innovative, user-friendly, and easily administered solution to fit all your website technology needs.

Wonderware Inc., dba CORE Business Technologies, is a private corporation with headquarters in Rhode Island and offices in Indiana and Florida. Geoff Kehrer, Client Success Manager, would continue to be the Town's primary contact. His contact information is as follows: gkehrer@corebt.com, phone: 866 567 2673 x 1565 or 720 741 0313; address: 950 Warren Ave., Suite 400, East Providence, RI 02914.

There is no pending litigation against CORE nor has there been any bankruptcy or insolvency proceedings in the last ten (10) years. CORE and any employees who may work on the project are free of any conflict of interest. Dan Paulus, CEO, whose signature can be found below, is empowered to bind CORE to the provisions of this RFP.

CORE's understanding and agreement with the Town's RFP requirements is founded on a) CORE's proven track record in the public sector web design industry, b) our existing 10+ year website design relationship with the Town and c) our 30+ years of experience and expertise in supporting the government sector. In fact, we currently support 1,600 government clients and enjoy long-standing relationships with some of the highest populated cities and counties in the U.S. Over these decades, CORE has consulted, encountered, designed, developed, integrated, implemented, and supported a wide range of public sector solutions -- some traditional while others unique and still others requiring extremely complex, omni-channel integrations with abundant proprietary and third-party system interfacing requirements.

CORE understands the importance of a well-designed website in today's digital landscape. Our approach goes beyond aesthetics; we focus on user-centered design, seamless functionality, optimization for both desktop and mobile platforms and when required, integrate payment technologies for a connected, digital commerce experience. Our goal is to enhance your online presence, improve user engagement, and drive meaningful engagements.

Thank you again. We look forward to the opportunity to build upon our existing partnership as you proceed with the due diligence phase of this process.

Best Regards,

A handwritten signature in blue ink that reads "Dan Paulus".

Dan Paulus
CEO



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3 Overview of Services

Provide a brief and concise synopsis of the proposal and a description of the Vendor's credentials to deliver the services sought under the RFP.

In response to the Town of McCordsville RFP for professional web design services, we are pleased to submit our proposal. Our team at CORE Business Technologies is excited to offer our expertise in creating captivating and effective web experiences that align with the Department of Education's goals and vision.

As stated in our cover letter, CORE's understanding and agreement with the Town's RFP requirements is founded on an existing 10+ year technology and payment relationship with the Town. Additionally, with a proven track record in the public sector web design industry, we understand the importance of a well-designed website in today's digital landscape. Our approach goes beyond aesthetics; we focus on user-centered design, seamless functionality, optimization for both desktop and mobile platforms and when required, integrate payment technologies for a connected, digital commerce experience. Our goal is to enhance your online presence, improve user engagement, and drive meaningful engagements.

Key Points of our CMS Solution:

- **Experience and Expertise:** Our team comprises skilled web designers, UI/UX specialists, and developers who have successfully delivered innovative web solutions across various industries. Our portfolio showcases our ability to blend creativity with functionality.
- **User-Centered Design:** We prioritize user experience, crafting intuitive navigation and visually appealing interfaces to keep visitors engaged. Our designs are rooted in understanding your audience and tailoring the experience to their needs.
- **Responsive Design:** In today's mobile-centric world, responsive design is a must. We ensure that your website looks and performs flawlessly on all devices, contributing to a consistent user experience and improved search engine rankings.
- **Customization and Scalability:** We understand that every business is unique. Our approach involves creating custom solutions tailored to the DOE's unique requirements. Furthermore, we design with scalability in mind, enabling your website to grow and evolve with changing departmental requirements.
- **Content Management System (CMS):** We propose the integration of a user-friendly CMS, allowing you to effortlessly update and manage your website's content, thus reducing maintenance costs and enabling you to stay current.
- **SEO Optimization:** Our designs are inherently search engine optimized, ensuring your website's visibility on major search engines. We follow best practices in coding, structure, and content to enhance your organic search rankings.
- **Collaborative Process:** Throughout the project, we maintain transparent communication and collaboration, keeping you informed and involved at every stage. Your feedback is essential in shaping the final product.
- **Timely Delivery and Support:** We are committed to delivering your project on time and within budget. Our post-launch support ensures that your website continues to perform optimally, and we are available for any updates or enhancements you may require.
- **Commerce Enabled:** With decades of experience developing and implementing advanced software solutions for public institutions, we understand the importance of providing connected experiences across the departmental enterprise. For this reason, our proposed CMS platform includes payment acceptance capability. This includes processing Cards & eChecks in a Town fee



absorbed manner or, if desired, CORE has the technology to impose a fee to the payer so Town departments can deploy a no cost payment acceptance solution. CORE's online payments solution reduces friction in the payments process resulting in operation efficiency gain and enhancements in citizen experiences. It is a digital-ready, connected solution for payment processing that allows organizations to manage regular or periodic billing needs for their citizens. Additionally, eBilling Portal (EBPP) capabilities include the elements of secure account login, invoice presentation, acceptance, processing and robust reporting, all in one secure platform.

Specific Required and Desired Project Components

A. High Level Requirements

- A.1. Design process should include opportunities for staff, public, and Town Council input and/or feedback.

Yes, this is supported through varying levels of access and controls within the site.

- A.2. Site should leverage responsive design to adapt seamlessly to screens of various sizes. (Mobile)

In today's mobile-centric world, responsive design is a must. We ensure that your website looks and performs flawlessly on all devices, contributing to a consistent user experience and improved search engine rankings.

- A.3. The vendor should configure the platform so that content can be easily created and updated by Town staff with multiple permission levels.

Yes, there are multiple levels of control that can be granted to users from the administrator.

- A.4. Site should meet WCAG 2.1 requirements for accessibility purposes.

This is supported. CORE will conduct ongoing assessments of your website's ADA compliance using an online tool such as the Wave Web Accessibility Tool (WebAIM). The following are some of the proactive steps that we take for ADA compliance in addition to this review:

- We include a 'Skip Navigation' button to help those using text readers.
- Every image that conveys contextual content has an equivalent alternative text specified in the alt attribute.
- Decorative graphics with no other function have empty alt descriptions (alt= "")
- Captions can be added to videos.
- Media players feature a link to download.

In addition, we also provide an optional ADA compliance widget and reporting tool which allows ADA users with the ability to modify the site based on their needs, as well as providing reporting capabilities across the site for your own ADA reporting requirements. Please see page 22 of this document for more information about our ADA capabilities. Click here to jump to the section:

[ADA](#)



- A.5. Site should not rely on dependencies or technologies that are not publicly documented and openly available.

All of the documentation is available through our online user guides.

- A.6. Site should adhere to security best practices. Effective spam mediation measures should be in place to stave off bots and malicious actors.

Yes, our servers and services are monitored 24/7 and our support staff is there to monitor for such issues if they occur.

- A.7. Site should make effective use of Town branding, including color scheme.

This is a standard feature of our CMS platform. Dedicated pages within the site would follow the same design as other pages and follow Town branding and color scheme.

- A.8. Site should include all content from current McCordsville website, excepting content identified as undesired by McCordsville

This is supported.

B. Highly Desired Components

- B.1. Site should provide a search feature for the site on the main page

Our innovative "Smart Search" feature provides a drop-down list of search content specific to the entire website or only specific sections. Smart Search indexes the pages of your website that constituents are looking for – key pages, directories of document types, events, key services and programs and more.

- B.2. Home page should be able to feature rotating new content/ photos

This is supported.

- B.3. Site should make McCordsville online resources, including databases, downloadable, easily visible, discoverable, and well-organized

Yes, this is all supported by our platform.

- B.4. Site should consider allowing users to make a payment to the Town

CORE provides several online payment options for sites requiring these services. From very basic online payments to more advanced integrated payments that require integration to a backend accounting system. In addition, CORE also provides technology for online reservations and ticketing for communities.

For online payments, CORE's payments platform is ideal for the following types of services:

- Basic payments, including donations.
- Taxes



- Utilities
- Park programs
- Court fees
- Traffic tickets
- Permits, and many more.

For more advanced integration to a backend accounting system requiring billing, eBills or invoices, we can provide these services as well with further discussion.

These services all provide the ability for your customers to pay online with credit and debit cards, as well as electronic check (ACH). We also provide services for in person payments (POS), interactive voice response (IVR) as well as payments by text if required.

All of these services are tightly integrated within the same eGov Manager that manages the website services, which provides for a better user experience across the enterprise.

B.5. Site must include a site map for the website

This is supported. Mega-menus and navigation builder for main site navigation are provided.

B.6. Menus should respond to taps/clicks rather than hovering (buttons and other smaller functions may respond to hovering)

We support both hover as well as clickable links.

B.7. Ability to easily create forms which can e-mail submissions to selected staff email addresses for example, rental requests, public record request, employment application, etc.

This is a standard feature of our CMS platform. This is done through our Action Center. The different forms can be sent to different departments depending on the type. They can also include payment if desired.

B.8. Ability to translate site into multiple languages, to be identified by Town

We can support multiple languages.

B.9. Ability to easily incorporate multiple photos and video (Town generated), both static and in slideshows, to highlight events and services and to enhance the appearance of the site.

Yes, this is supported by our platform.



C. Current external integrations and embeds

- C.1. Site should integrate with Town permitting third-party vendor iWorQ. New permitting programs will be considered.

While we could provide services to build out an API, in most instances a link works perfectly well and can easily be implemented as a part of the base services. We do this with many other sites using iWorQ.

- C.2. Keyword optimization with improved SEO, title and metadata descriptions, include implementation of Google analytics

Yes, a Google Analytics account is standard with our services, as is our ability to assist in maximizing the needs around these analytics.

- C.3. Seamless social media integration for common platforms such as Facebook an Instagram, and YouTube.

This is a standard feature of our CMS platform. We can display feeds from Facebook and Twitter.

- C.4. Beacon GIS integration

Links to this service are common and we're happy to assist you in providing these.

- C.5. Survey Monkey or JotForm's for specific citizen communications

Yes, similar to other third-party services we can provide links to, this too is something we've deployed for other sites.

D. Desired New Features

- D.1. Dedicated home buttons for RFP's, Development Filings, and Public Notices

Yes, these would be service icons, and we will work with you to determine the number and desired content and links for all the services you wish to use.

- D.2. Codification Section easily manageable

No coding or developer experience is required. CORE's CMS platform makes it easy to get your website up and running quickly and easily with a library of templates. Each template can be selected, applied to your site, and modified to meet more specific needs. Common templates include an agenda builder (including a link constituents can click to watch a live streamed meeting), action center to help website visitors report a need or concern (with embedded workflows for every action), FAQ page, job postings and boards, online payments, event calendars, news, document centers, and more.



- D.3. Recreation (Parks) rental section (for future use to be activated later)
- D.3.1. Ability to sign up for programs
 - D.3.2. Ability to reserve and pay for rentals of shelters, Community Center, and fields
 - D.3.3. Ability to make a donation to "Building A Brighter McCordsville" Fund

Yes, all our payment services provide these services. Please see page 23 of this document for more information. Click here to jump to the section: [OPTIONAL FEATURES CORE CAN PROVIDE FOR ONLINE PAYMENTS CONSIDERATION:](#)

- D.4. Options for permitting and licensing.

Yes, permitting and licensing are certainly options within our online payment services.

- D.5. Combine "nextstopMcCordsville.org" with "McCordsville.org"
- D.5.1. Remove old websites from the web once new site is implemented and it is confirmed all data has transferred over.

Yes, this is something that we can easily provide.

- D.5.2. Add in downloadable maps, statistics such as tax rate, population, etc., reports and studies

Yes, this is something we can provide as a part of our services through mapping services, or via links.

- D.6. Explore and manage domain: McCordsville.gov? McCordsville.in.gov?

Yes, the domain will reside within our servers, and we will manage these based on your requirements.

3.1 General Project Plan

1. **WORK PLAN** Provide a detailed narrative on how your company plans to provide a well-designed and innovative website for McCordsville including:
 - a) Description of the website redesign methodology recommended for McCordsville and to be used to meet the requirements of this RFP.
 - b) Project plan that specifically describes how the Vendor intends to successfully complete each phase of the project plan. The project plan should clearly identify all the tasks and activities the Vendor will complete to successfully provide the services requested in this RFP.

Project Approach

Your assigned project leader will utilize a proven methodology for delivery of projects that consists of clear implementation phases with signoffs, and the project tasks and deliverables that comprise those phases.

These phases include:

- Project Kickoff



- Payments Roadmap
- Agile Development
- Commerce Configuration
- QA, Walk-Throughs, and Training
- Payment Portal Launch

CORE's Professional Services team will deliver the following baseline project level services:

- **Design/Discovery** – Comprehensive evaluation of requirements.
- **Project Management** – Ongoing oversight of project plan.
- **Design Planning** – Requirements for integration and creation of a Project Roadmap.
- **Software Configuration** – Use our government-architected software to create items that are configured w/ integration and reconciliation strategies to meet your needs.
- **Agile Design and Development** – An interactive approach to creating advanced, integrated functions.
- **Quality Assurance Testing** – Simulating activities in a test environment.
- **Web-Based Training** – Train the Trainer format.
- **Commerce Launch (optional)** – Taking the new Payments Platform to market with little disruption.
- **Ongoing Audits** – Regular reviews with your CORE Customer Success Manager and Support Team

DISCOVERY

CORE works diligently with each government client, department, and agency to fully understand their current environment, citizen engagement, management systems, and data requirements. CORE invests the time and resources needed prior to recommending and architecting solutions, services, and options that will achieve stated goals and initiatives.

DESIGN

The Design phase is utilized to identify and solidify the requirements of the project to ensure that the systems meet the needs of the customer and establishes adoption for use.

Resources	Task Examples	Deliverables
CORE: Designer, Implementation Specialist, Developer, IT, Project Manager Customer: Management Stakeholders, Leader User(s), Project Manager, IT, Web Services	Onsite/Virtual Design Visit Workflow Analysis Technical Requirements Peripheral Requirements	Project Design Specification

DEVELOPMENT AND CONFIGURATION

The Development and Configuration Phase concentrates on creating and delivering the requirements outlined from the Project Design Specification.

Resources	Task Examples	Deliverables
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CORE: Implementation Specialist, Developer, IT, Project Manager Customer: Management Stakeholders, Project Manager, IT, Web Services	Project Build Web Services Build System Configuration Alpha and Unit Testing Initial Assessment Customer Test Environment	Development Environment Web Services
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TEST

The Test phase establishes quality assurance and control.

Resources	Task Examples	Deliverables
CORE: Implementation Specialist, QA, Developer, IT, Project Manager Customer: Management Stakeholders, Leader User(s), Project Manager, IT, Web	Regression Testing	User Acceptance

Implementation Support

During implementation, you will have full access to our project team to ensure timely resolutions of any issues that arise. Training is provided in a train-the-trainer approach. Technical assistance is provided by our project team to include hardware specialists and engineers. CORE will also provide User, Admin, and Reporting guides that will outline your specific functionality at the time of your go live. Additionally, CORE can and will accommodate onsite visits should they be needed.

2. **PROJECT PLANNING AND MANAGEMENT** Describe the planning and management skills your company will employ to ensure the prompt meeting of deadlines as they pertain to the project phases defined above.

A Clearly Outlined Project Rollout Through CORE's PMO

As your implementation is rolled out, your project will be managed through CORE's formal Project Management Office (PMO). With dedicated resources, state-of-the-art communication and collaboration tools, and clearly outlined milestones, your project will stay on track, on time, and on target for your business goals.

CORE utilizes an established project management process based on the Project Management Institute's (PMI) Body of Knowledge. The process provides consistency, predictable outcomes, and reliability through measurable results. The gated phases of the project include Design, Development and Configuration, Testing, Training, Go Live, and Transition to Support. The Phases are structured in parallel succession to ensure efficiency in achieving expected deliverables on time and within budget. All phases are executed, monitored, and controlled by a project manager. As each project is unique through the offerings CORE provides their customers, the tasks, deliverables, and milestones are tailored to meet the needs of not only the project, but also the customer's project team.



3. **PERFORM IMPLEMENTATION** Describe how your company will promptly meet the development and deployment phases, including how usability testing will be performed by vendor and Town.

CORE's project approach uses best practices from hundreds of implementations. We use a proven collaborative methodology designed to implement our solution effectively and efficiently in support of our clients' requirements and business objectives. We partner with our clients from project initiation through the deployment and transition phases to ensure implementation of a strategically aligned solution that delivers measurable results and the highest return on investment. The following is a sample project plan schedule, timeframes can fluctuate based on the Town's staff availability.

4. **PROVIDE POST IMPLEMENTATION SUPPORT** Describe how your company will provide maintenance and support after the roll-out of the new Town website, including how we can expect the Vendor to communicate with us.

With CORE as your partner, you can expect a product that delivers on expectations, a team that offers support, and a modernized constituent experience.

A Dedicated Client Success Manager

For the life of our partnership, CORE will assign your business a dedicated Client Success Manager. Tasked with understanding your departments, your needs, and your current challenges, your Client Success Manager will work as your direct connection to CORE. Your team can email, call, and message your Client Success Manager for support, help with any product issues, and feedback.

A Team of Support Experts

After your custom implementation, the CORE support team will engage with your business and follow up regularly and proactively to gather feedback. With both CSAT and NPS surveys, CORE strives to measure every customer's satisfaction and gather feedback to improve our processes with every implementation.

A Resource Library Built for CORE Customers

With CORE, your team is not alone. Beyond your dedicated Client Success Manager, project manager, and the team of support experts, CORE maintains a library of resources on corebt.com. We encourage all CORE customers to utilize the library of blogs, guides, webinars, and more.

A CORE User Group and Executive Advisory Board

CORE strongly encourages and invites all CORE customers to participate in CORE Connect, our user group, and the Executive Advisory Board (EAB). With more customer participation, CORE can implement feedback and make roadmap changes that will benefit more customers. User group participation also allows customers to see and test upcoming features of the CORE platform.



5. **PROJECT TIMELINE** Provide a project timeline and schedule for completion of all activities, that should demonstrate all work on the website should be completed. Proposal must include a detailed schedule of work and activities based on the deliverables in section 3.3.2.

PROJECT TIMELINE

The following timeline is typical for a project similar in size and scope, however, client responsiveness, and migration can impact overall timeline:

STEP 1 Project Kickoff INITIAL KICKOFF MEETING <ul style="list-style-type: none"> Review CORE Website creation process Review project scope and schedule Identify site goals and objectives 	WEEK 1 – 2 DELIVERABLE/MILESTONE <ol style="list-style-type: none"> CORE Kickoff Meeting Notes Confirmed timeline Guide for Photo Collection
STEP 2 CORE Roadmap CLIENT DISCOVERY – DEPARTMENT PLANNING SESSIONS <ul style="list-style-type: none"> Complete client worksheets Interviews with Department leaders and stewards Identify site visitors' needs; address w/ online services 	WEEK 3 - 12 DELIVERABLE/MILESTONE <ol style="list-style-type: none"> CORE Roadmap (information architecture) for website content & services
STEP 3 Design Roadmap & Development PLANNING THE WEBSITE DESIGN <ul style="list-style-type: none"> Design Roadmap Questionnaire <ul style="list-style-type: none"> Best Practices Library Client internal meetings to engage staff Client branding review, theme identification, logo standards, and community identification factors (landmarks, traits, etc.) Discuss and develop navigation architecture 	WEEK 10 - 26 DELIVERABLE/MILESTONE <ol style="list-style-type: none"> Design Best Practices Design Roadmap Meeting Summary Site Designs and Re-work for Home Page, Department and Application Templates
STEP 4 Agile Content Jumpstart RELEASE PAGES TO CLIENT FOR REVIEW & UPDATES <ul style="list-style-type: none"> Plan Release of Key Pages using Agile "Sprints" Training for Webmasters and Super Users Based on Sprint Review and Update Content in Each Sprint Provide Feedback to CORE UI Team in Each Sprint 	WEEK 16 – 28 DELIVERABLE/MILESTONE <ol style="list-style-type: none"> CORE will transition all new and existing content per Roadmap Populate online service modules Client will begin Training Process
STEP 5 Training TRAINING – KNOWLEDGE TRANSFER & TEAM CORE <ul style="list-style-type: none"> Training for Department Administrators Ongoing learning available via Team CORE resources (on-demand training videos and presentations) 	WEEK 28 – 31 DELIVERABLE/MILESTONE <ol style="list-style-type: none"> Online Training Sessions Team CORE Learning System (videos and presentations)
STEP 6 Website Launch and Promotion SITE LAUNCH COORDINATION <ul style="list-style-type: none"> We launch when you're ready ... Provide sample text for press releases & promotion Ongoing refresher training and consultation available 	WEEK 32 DELIVERABLE/MILESTONE <ol style="list-style-type: none"> Comprehensive DNS consulting and management services Pre-launch Checklist/Follow-up



3.2 Deliverables and Completion

The project should achieve the following phase structure and deliverables to be considered complete.

Definition Phase: The Vendor will work with the Town to finalize the information architecture for the site, including the site map. The Vendor will work through revisions and suggestions with the Town. The Vendor will deliver final wireframes detailing the components and features of the homepage and interior pages.

Deliverables:

1. A method for feedback that will inform the design process
2. Findings summary that details how the new design will incorporate brand strategy and targets identified audiences.
3. Findings summary on improving current front-end design and back-end coding practices.
4. Preliminary site map.
5. Proposal of hosting plan. Details of what is included (server space, updates to CMS, security, application, and widget updates).

Design Phase: The Vendor will develop a clean, modern, high-quality design that will serve our organization and audience. The vendor will provide a minimum of two homepage design options followed by revisions based on feedback from the Town. The Vendor will provide two design options for the interior pages followed revisions based on feedback.

Deliverables:

1. Wireframe designs for two design options.
2. Design mockups for revision templates.
3. Selection of final design by appointed staff.

Development Phase: The Vendor will implement the final approved design and build out site in a Content Management System. Vendor will test the system, fix bugs, and install web features. Vendor will have all third-party integrated programs in place and ready for seamless transitions. Vendor will deliver a document to the Town articulating how all stated required and desired components have been incorporated into the design.

Deliverables:

1. Summary of findings for website team on the existing functionality with any notes, adjustments, or suggestions.
2. Developed modules for content creation, custom or pre-existing, for testing.
3. Staff training for adding/editing/deleting content.

Deployment Phase: Before project completion, Vendor will provide appropriate documentation and training to the appropriate Town staff, detailing the features and functionality of the new site. The vendor will train designated Town staff on the daily maintenance and upkeep of the site. The vendor will warranty their work for a period of a year and will address technical problems that arise during the first twelve months after completion of the website. Hosting will continue past deployment.



Deliverables:

1. Website style guide.
2. Collection of content which corresponds to each page, provided by the Town.
3. Sample pages from the Contractor exhibiting layout, styles, and options.
4. Summary of modifications presented by website team.
5. Documentation of modification.
6. All documentation and manuals for maintenance of the website.

4. Quality Control & Support

Please provide a summary of how your company monitors for quality control and provides customer support, addressing the following questions:

- What are the procedures for contacting your company for support?

There are multiple ways for customers to contact CORE's Software Support team.

- Customers can either email the support team with their issue and have a Case automatically created for them;
- they can use our customer support portal, powered by Service Cloud, to enter a Case; or
- they can call our support team by phone.

We make it easy to contact a support representative, using the method you prefer.

- Who are the key support team personnel/customer contacts?

At CORE, delighting our customers and providing best-in-class service and support is paramount to our mutual success. CORE provides comprehensive Software Support through a team that is staffed by highly skilled Support Analysts.

In addition, CORE has a comprehensive Customer Success and Support Model that will be provided to the Town. The Town will have its own dedicated Customer Success Manager. Your Client Success Manager (CSM) will act as your advocate to provide direct oversight of joint initiatives while working collaboratively across the CORE organization to ensure that the quality assurance testing, implementation and deployment of any software releases, and new or ongoing projects drive the expected outcomes. The CSM will also provide you with timely and transparent communication of new product features and other relevant news and information, facilitate ongoing training, provide training assets to your staff and ultimately be responsible for your overall satisfaction. Geoff Kehr, the Town's current CSM, would continue to work with the Town.

Additionally, look for your Customer Success Manager to schedule annual Executive Business Reviews with you to delve into the prior years' performance metrics and to strategize on how we can deliver more value to you.

- What will be the pricing structure for ongoing hosting and support after the contract period concludes?

Please see the pricing proposal in Section 6.



Please provide any sample support and maintenance agreements with the corresponding Cost Worksheet.

Please see attached document showing our standard terms and conditions
CORE's engagement and payment platform is available 24 hours/ day and 7 days a week with a 99.9% guaranteed uptime except for routine maintenance.

Support team SLAs are as follows:

All Products

Priority Level	Definition	Escalation to Next Point	Response Time	Coverage
1	Product is down. No workaround is available. Major product functionality is not working according to product specifications. CORE places top priority on the technical issue and all necessary resources are immediately assigned to the issue.	Reviewed by Support Manager on an hourly basis. Escalation to Engineering, if necessary, prioritized ahead of all other issues.	< 1 coverage hour	24x7x365
2	Product functionality is affected but suitable workarounds exist and product is not down. Core places high priority on issues that are technical and issues are prioritized accordingly and work is performed during regular support coverage hours.	Reviewed daily by Support team. Escalated to management for review, as necessary. Issues that affect downtime are escalated immediately.	< 2 coverage hours	Monday - Friday In-Person - 7:00am - 9:00pm (ET) Online - 8:00am - 5:00pm (ET) Merchant - 9:00am - 6:00pm (ET)
3	Minor product functionality is affected or minor business processes cannot be completed. The issue is prioritized among other open issues of similar priority.	Reviewed weekly by Support Analyst. Escalated to support manager for review, as needed.	< 4 coverage hours	Monday - Friday In-Person - 7:00am - 9:00pm (ET) Online - 8:00am - 5:00pm (ET) Merchant - 9:00am - 6:00pm (ET)
4	Product and Project specific enhancement request or change orders. Change orders are scheduled upon signed acceptance receipt from the Customer. Product enhancement requests are reviewed by Product Manager periodically in conjunction with release schedule.	Reviewed weekly based on delivery or release schedule. Delivery will be quoted with response to each specific request.	Delivery will be quoted by Client Success Manager with response to each specific request.	Monday - Friday In-Person - 7:00am - 9:00pm (ET) Online - 8:00am - 5:00pm (ET) Merchant - 9:00am - 6:00pm (ET)



5 Exceptions

If the Vendor's specifications for providing services are in any respect not the equivalent of the website components in the RFP, please provide a description of those exceptions. Vendors are invited to propose, and McCordsville will consider reasonable modifications to the required and desired website components. Please note any impact on pricing that the proposed modifications will affect.

If the Vendor can provide all website requirements as specified in section 2.1, note "None."

None.

6 Pricing, Payment, and Cost Schedule

The vendor will provide a Cost Proposal that shall present a total fixed price to perform all the requirements of the RFP. The Proposer must include details in the Owner's Cost Proposal template supporting all costs. These details must include, at a minimum, detailed descriptions and/or specifications of the goods and/or services to be provided, quantities, and unit costs.

The payment schedule for the project is tied to specific dates and deliverables as outlined in the awarded contract. Invoices may be submitted by the Vendor on specific dates based on the completion and acceptance of related deliverables. No invoice will be approved unless the associated deliverables have been approved by the Owner's designee. A percentage of the total contract cost may then be invoiced based on the schedule.

Please see the following pages.



Statement of Work Between McCordsville, IN and CORE Business Technologies



AUGUST 25, 2023

This Statement of Work is made by and between McCordsville, IN whose principal address 6280 West 800 North, McCordsville IN 46055 (hereinafter, "Client"), and the service provider, Wonderware Inc. d/b/a CORE Business Technologies, d/b/a eGov Strategies, with its principal office at 950 Warren Avenue, 4th Floor, East Providence, RI 02914 (hereinafter, "eGov").

NOW, THEREFORE, the parties agree to this Statement of Work for reimbursement of services to be performed as detailed in the Scope of Services.

1. Scope of Services

See Attachment A.

2. Payment for Services

- 75% of total project due at contract signing to start and complete the project
- Remaining 25% billed upon redesign website launch

3. Authorization of Change

IN WITNESS WHEREOF, the parties have signed this Statement of Work as of the date set forth above by officials to bind their respective organizations:

	McCordsville, IN	eGov/Core Business Technologies
Signature:	<hr/>	<hr/>
Printed:	<hr/>	<hr/>
Title:	<hr/>	<hr/>
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Attachment A – Scope of Service

CORE will provide professional services to redesign the Town of McCordsville's website based on a "best practices" design, development, and reviews of the website.

ITEM	NOTES	TOTAL
Redesign McCordsville's website		\$9,500
• Customer to choose template based on available designs		
• To include mega-menus, smart-search, and responsive design features		
• Provide new color scheme and fonts to match branding requirements		
• Consultation on all design aspects and migration to new redesigned site		
PROJECT TOTAL		\$9,500

PROJECT SCOPE NOTES:

- **eGov Strategies** is now a division of **CORE Business Technologies**, a nationwide software provider of payment and citizen engagement solutions for local and state government clients.
- **Increased Annual Support & Maintenance:** There is no annual increase for maintenance and support as part of the redesign.
- **Templated Design:** The design must be selected from an existing template at the time of contract signing.
- **Site Customizations:** The Town will be given a questionnaire that outlines the customizations which are allowed. No changes to the design beyond those outlined in the questionnaire will be permitted.
- **Content Requirements:** CORE will not be editing/deleting/adding any content for the site. Any content changes required to the site must be completed by the Town. CORE will provide training.
- **This quote is valid for 90 days from the date above.**



Additional Website Services for Consideration (Optional):

ITEM	TOTAL
Agenda Builder (see notes below)	\$2,000
eNotifications (includes unlimited emails) - SMS messages can be added for an additional \$500 (see notes below)	\$3,000
ADA Site Widget and Site Reporting (see notes below)	\$750/yr

NOTES:

- **Agenda Builder** provides sites with an HTML templated approach to building, planning and accessing meeting agendas and minutes. It's a beautifully designed feature to allow constituents to access and view agendas and associated documents and links, and provides users with the ability to plan, access and approve all meeting items.

In addition, with the passing of Indiana's House Bill 1167, Agenda Builder can provide links to recorded meetings that are uploaded to a YouTube channel for constituents to access anytime.

The fee to add Agenda Builder is a one-time fee of \$2,000.

- **eNotifications** provide sites with the ability to send community related emails, SMS messages, or both through subscription managed lists that constituents sign up to receive. Town council agendas and meeting information, urgent weather or boil alerts, parks and recreation programs, etc. There's no limit to the number of messaging opportunities to keep you community engaged and informed.

The fee to add eNotification services is a one-time fee of \$3,000 which includes unlimited emails. If you'd like to add SMS messaging, an additional fee of \$500 would be added for 5,000 SMS messages and setup. Addition blocks of messages can be added at any time for \$200 per 5,000 messages.

ADA

- **ADA Site Widget and Reporting** adds additional support and security services to your site and provides enhanced features for the user and the site. While every site CORE/eGov develops is ADA compliant upon release, it sometimes doesn't take long for an item to be added or changes made that could take it out of ADA compliance. Our tools provide the ability to allow an ADA citizen to view, hear and/or modify the site with the assistance they require, plus, it provides the site with reporting across the site to see where issues may be and provide AI services to mitigate the affected page, items, etc.

The fee for these ADA services are billed annually as a part of the annual maintenance and support for the site for an additional \$750/year.



OPTIONAL FEATURES CORE CAN PROVIDE FOR ONLINE PAYMENTS CONSIDERATION:

CORE/eGov provides several online payment options for sites requiring these services. From very basic online payments to more advanced integrated payments that require integration to a backend accounting system. In addition, CORE also provides technology for online reservations and ticketing for communities.

For online payments, CORE's payments platform is ideal for the following types of services:

- Basic payments, including donations.
- Taxes
- Utilities
- Park programs
- Court fees
- Traffic tickets
- Permits, and many more.

For more advanced integration to a backend accounting system requiring digital billing, notification, eBills or invoices, we can provide these services as well with further discussion.

These services all provide the ability for your customers to pay online with credit and debit cards, as well as electronic check (ACH). We also provide services for in person payments (POS), interactive voice response (IVR) as well as payments by text if required.

All of these services are tightly integrated within the same eGov Manager that manages the website services, which provides for a better user experience across the enterprise.

For reservations and ticketing, our Jubilee platform is ideal for the following types of services:

- Park shelters/pavilions or community center reservations.
- Community concerts or other events that require tickets, both reserved or general admission.

Pricing for our online payment services can be discussed based on requirements and we're more than happy to provide you with more information at any time.



7 References

The Vendor must supply three references for similar work it has undertaken over the past five years, preferably within a town, school, public/government building or other community space.

Provide the company/organization name; contact name(s); email address; telephone number; and a brief description of the work performed.

Failure to provide the above information may result in the Vendor being disqualified and its proposal not considered. Town reserves the right to contact all references to obtain information without limitation and regardless of the Vendor's performance on the listed jobs.

City of Franklin, IN

70 E. Monroe St. Franklin, IN 46131

Rick Littleton

317-736-3640

rlittleton@franklin.in.gov

Services provided: Site Design, Content Management and online billing and payments

West Central Conservancy District

243 S. County Road 625

East Avon, IN 46123

Aaron Riggle

317-272-2980

Services provided: Site Design, Content Management and online billing and payments

Montgomery Township, Pennsylvania

1001 Stump Rd. Montgomeryville, PA 18936

215-393-6905

Derek Muller

215-393-6905

Services provided: Site Design and Content Management



8 Declaration and Signature



DECLARATION:

The undersigned hereby declares the proposal's specifications have been carefully examined and this proposal is submitted in compliance therewith. The undersigned understands that competence and responsibility, time of completion, as well as other factors of interest to McCordsville may be a consideration in making the award. McCordsville reserves the right to reject any one or all proposals, to accept or reject alternate proposals and unit prices, and waive technicalities concerning the proposals received as it may be in McCordsville's best interest to do so.

AUTHORIZED REPRESENTATIVE:

Dan Paulus	CEO
Authorized Representative's Name	Title
<u>Dan Paulus</u>	<u>08/24/2023</u>
Authorized Representative's Signature	Date
CORE Business Technologies	<u>866-567-2673</u>
Company	Telephone
950 Warren Ave., Suite 400	<u>dpaulus@corebt.com</u>
Street Address	E-Mail
<u>East Providence, RI 02914</u>	
City/ State/ Zip Code	



Additional Information

Training

CORE's goal is to help you develop a better-trained employee quickly and at the lowest cost possible. Learning how to effectively use your new CMS platform is potentially the most important thing you can do to ensure successful implementation and the long-term success of your usage of CORE's solutions. CORE trainers will work closely with your team during every stage of the process and openly share their knowledge.

The CORE Project Leader will work with the Town Project Coordinator to identify who will need content editing and webmaster training.

CORE utilizes an "agile" software development methodology to expedite implementation of website. Using "agile" has at its core the following advantages: 1) early and continuous feedback from Clients to Design/Development; 2) earlier access to functionality so Clients "learn-as- they-go". In CORE's agile implementation, functionality is delivered in short, 3-week periods called "sprints". After all planned "sprints" have been completed for the core website design, development, and planning functions (Design and Discovery), the CORE Project Leader will initiate the Agile Content Jumpstart process.

The Agile Development process involves key content managers (generally, your organization's webmaster(s)) involved in updating website content early in the process. CORE will provide more formal training to Department Administrators as described below.

Before the training sessions, CORE will configure user access for trainees so they can begin using the system IMMEDIATELY after training has been completed. A comprehensive User Guide is used within the online training lessons so that users are familiar with it and can use it as they learn at their own pace. Students will also have access to CORE's on-demand learning environment. A specific training plan is developed, depending upon the approach for website management decentralization.

Training sessions will generally cover the following:

- Introduction to Website Editing Introduction to Administrative Tool Department Page Management Strategy Updating Department Pages
- Editing Contact Information for Key Pages
- Adding and Modifying Pages within a Department
- Using the Photo Gallery
- Adding Documents and Events
- Review of Online Services
- Webmaster Training
- Page Management Strategies Adding and Modifying Users Updating Website Navigation Action Center for Online Forms and Reporting

