The State Bar of California

845 S. Figueroa Street, Los Angeles, CA 90017

REQUEST FOR INFORMATION

This document is a Request for Information ("RFI") for the State Bar of California's Websites Development project.

The State Bar of California ("the State Bar") is in the process of finalizing requirements and procurement strategy to acquire services for building public-facing websites, calbar.ca.gov and statebarcourt.ca.gov, and implement a modern content management system (CMS). The State Bar is requesting input from the vendor community via this RFI to help formulate the most effective approach for the project, including refining methodology, technical requirements, and shaping the procurement strategy.

To participate in this RFI, please submit an electronic copy of your response by email to Sunly.Yap@calbar.ca.gov no later than **3:00 p.m. on October 11, 2024** ("**Submission Deadline**"). Vendors will receive a confirmation email notifying them of receipt. If vendors do not receive such email, please follow up by email to Sunly Yap. Please use this document as reference when responding to the RFI. It outlines the project scope, objectives, requirements, general information, and questions.

A response to this RFI is not a mandatory requirement for participation in any subsequent solicitations released by the State Bar.

Release of this RFI in no way obligates the State Bar to conduct a follow-on competitive procurement or award a contract.

I. INTRODUCTION

The State Bar of California ("State Bar"), created in 1927 by the Legislature and adopted as a judicial branch agency by amendment to the California Constitution in 1960, is a public corporation within the judicial branch of the state government. The purpose of the State Bar is to ensure that the people of California are served by the legal profession in a manner consistent with the highest standards of professional competence, care, and ethical conduct; to carry out such additional programs as may be required by law or by the rule of court, and to contribute generally to the science of jurisprudence and the administration of justice. The State Bar serves as an administrative adjunct to the California Supreme Court in all matters pertaining to the admission, discipline, and regulation of California lawyers. The California Constitution, the State Bar Act and California Rules of Court vest in the State Bar the duty to regulate the legal profession, formulate and elevate educational and professional standards, raise the quality of legal services, advance the science of jurisprudence and aid in the improvement of the administration of justice.

The State Bar is a unified, or integrated bar, and all attorneys who wish to practice law in the State of California must be licensed by the State Bar and in good standing. In addition to its mandated licensing, disciplinary, and certification functions, the State Bar offers several other programs designed to assist, educate, and protect the public and licensees. Fees paid by

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licensees and applicants to practice law finance the State Bar's programs. The State Bar has nearly 300,000 licensees, making it the largest unified state bar in the country with offices located in Los Angeles and San Francisco. For more than 90 years, the State Bar has shaped the development of the law, regulated the professional conduct of the state's attorneys, and provided the public with greater access to information in the attorney discipline system.

[Read more about the State Bar.](#)

II. INFORMATION REQUEST

A. Project Background and Overview
Current Websites
The State Bar's websites—www.calbar.ca.gov and www.statebarcourt.ca.gov—are vital communication tools for the organization to carry out its mission. The [State Bar's main website](#) is the entry point for various interactions and transactions with several discrete audiences, including the public, attorneys, and prospective attorneys. In addition, the platform provides transparent information and analytics on State Bar programs and governance activities.

The State Bar Court hears disciplinary charges filed against attorneys, and [its website](#) provides information on cases, proceedings, and opinions regarding those cases.

The State Bar seeks to develop and implement our new websites designs on a modern content management system (CMS) that is user friendly and easy to create, publish, and maintain web content. The State Bar is nearing completion of a web redesign project and is seeking a highly skilled web development team to implement the designs in line with the documented requirements and UI/UX specifications.

B. Project Goals
The State Bar is looking for an agency with demonstrated experience in web design, development, and implementation of content management systems (CMS) to deliver a new digital experience for members of the public, attorneys, law students/applicants and other audiences and stakeholders. Our goal is to create a web presence that reflects best practices in design, user experience, usability, accessibility, and Search Engine Optimization (SEO) on a new CMS platform that improves content collaboration and rapid content production with well-developed workflows and tracks robust analytics.

1. **Implement a Seamless Web Experience:** Translate the completed designs into fully functional, accessible, and user-friendly websites that enhances the public's access to legal resources and services.
2. **Ensure Compliance and Security**: Build secure, compliant websites in accordance with ADA, privacy, and state regulations.
3. **Optimize for Performance and Scalability:** Develop our two websites to be high-performing, responsive, and scalable to accommodate future growth or feature additions.
4. **Facilitate Efficient Content Management:** Ensure that the websites' back-end allows easy updates and content management by the State Bar's staff.

C. **Project Objectives**
1. **Flawless Design Implementation**: Accurately translate the existing UI/UX designs into functional, interactive websites that adhere to the approved visual and technical specifications.
2. **Cross-Platform Compatibility**: Ensure that the websites are fully responsive and perform consistently across all platforms (desktop, mobile, tablet).
3. **CMS Integration**: Implement a robust content management system (CMS) that allows non-technical staff to manage and update site content without technical assistance.
4. **ADA and Regulatory Compliance**: Verify that the websites meet minimum ADA accessibility standards (WCAG 2.1) and other relevant regulations.
5. **Security and Performance Testing**: Conduct thorough testing, including performance, security, and usability tests, to ensure the websites function smoothly and securely before launch.

D. **Key Deliverables**
Developing two websites based on designs provided. An evaluation to select a new content management system (CMS) platform is still in progress and will be selected before this project begins.
- Implementing a new CMS to create, update, optimize, and deliver content to the right audiences at the right time that facilitates impactful digital experiences.
- Providing training to users.
- Ongoing support post launch for the duration of the contract.

Fully Developed Websites:
- Two public-facing websites built according to the approved designs, ensuring that all pages, functionalities, and interactive elements are fully implemented.

Responsive Design Implementation:
- Websites that are fully responsive, ensuring seamless functionality across all devices (desktop, tablet and mobile) with a consistent user experience.

Content Management System (CMS):
- A robust, user-friendly CMS that allows non-technical staff to easily update and manage content, including the ability to add, edit, and remove pages and content.
- **User Guide for CMS:** A detailed manual explaining how non-technical users can manage content, troubleshoot, and handle day-to-day operations.

ADA and Regulatory Compliance:
- Websites that meet at a minimum WCAG 2.1 accessibility standards, ensuring compliance with ADA and other relevant regulations.
- **ADA Compliance and Accessibility Report:** Documentation of accessibility testing results and steps taken to ensure compliance.

Security Features:
- Implementation of all necessary security measures such as SSL certificates, data encryption, and user authentication.
- **Security Features Documentation:** A document outlining the security protocols and best practices for maintaining security post-launch.

Testing and QA Reports:
- Detailed reports from performance, usability, security, and cross-platform testing, ensuring the websites reliability and adherence to requirements.

- **Testing and QA Reports:** Comprehensive documentation of all testing activities and results, including any fixes made.

Design Implementation Documentation:
- Documentation mapping the approved designs to the developed websites, detailing how the designs were implemented and any changes made during development.

Source Code Documentation:
- Well-commented code and instructions on setting up the development environment, building, and deploying the websites.
- **Source Code Documentation:** A document that describes the structure of the codebase, including key components and dependencies.

Maintenance and Support Plan:
- A post-launch support and maintenance plan, including ongoing updates, security patches, and performance monitoring.
- **Maintenance and Support Documentation:** An outline of the support strategy and a schedule for updates, along with contact details for support.

Deployment and Hosting Documentation:
- Detailed documentation of the deployment process, including hosting configuration and cloud services used, as well as guidance on scaling the websites.

Launch-Ready Websites:
- Fully operational websites that have been thoroughly tested and are ready for public launch, with all required content, features, and integrations functioning properly.

Post-Launch Monitoring Plan:
- A plan for monitoring site performance, security, and user feedback after the launch, including the tools and metrics used for this purpose.
- **Post-Launch Monitoring Documentation:** A document outlining the monitoring plan and response strategies for post-launch performance tracking.

Change Log:
- A record of changes made during the development process, including design adjustments, feature updates, or bug fixes, with justifications for those changes.

Training Materials:
- Training resources for internal staff, such as guides, video tutorials, or live session materials, to ensure efficient website management post-launch.

E. Project Scope
The selected vendor will be responsible for the following scope of work:
- Needs Assessment: Review the current websites content, features, and technical infrastructure; analyze design outputs from the Websites Redesign Project and conduct stakeholder interviews to understand business requirements and user needs.
- Requirements: Identify content management goals and objectives, including scalability, streamlining workflows, improving content accessibility and customer experience.
- CMS Platform Evaluation: Assess the selected CMS to understand key features and capabilities; recommend and develop new designs that best meet our user, functional and technical requirements.

- Implementation and Configuration: Install, configure, and customize the selected CMS to match our branding, content workflow and other specifications.
- Content Migration: Migrate existing websites content from the current CMS to the new selected platform, preserving formatting and metadata.
- Integration and Connectivity: Ensure the new CMS seamlessly integrates with our existing infrastructure and relevant systems and tools.
- Training and Documentation: Provide comprehensive training for our web content authors and administrators. Deliver detailed user and technical documentation.
- Support and Maintenance: Offer ongoing technical support, security updates and platform maintenance for the duration of the contract.

The following deliverables and artifacts will be available for the selected vendor for review to understand our design vision and goals. These deliverables were developed in partnership with a design vendor as part of our Websites Redesign Project, which ends January 2025.

- Discovery and Assessment: Web Strategy and Creative Briefs, evaluation of our current websites, User Experience (UX) assessment and strategy, personas, user journeys, and information architecture.
- Design recommendations: Wireframes, design concepts, page layouts, graphic elements, content types, and design prototypes.

F. **Scope Considerations –**
The State Bar's public-facing websites are the first point of contact many people have with the organization and function as portals for them to access critical resources and perform regulatory obligations. The main website, www.calbar.ca.gov, has more than 2,700 pages, 2,200 documents and nearly four million visitors annually. The current websites are built in DNN, an open-source .NET content management system.

1. Nonfunctional Requirements
    a. **Availability**
        a. External system must be available 24/7 at all times except during scheduled maintenance windows and achieve 99.5 percent uptime during State Bar's nonbilling period and 99.9 percent during billing peak time (Dec-Feb).
        b. Standard maintenance window will be defined for failover testing, application implementations.
    b. **Capacity**
        a. System should support the expected peak concurrent sessions during peak times.
        b. System should support reporting demands without impacting performance.
        c. System should be able to store growing data and documents.
        d. System should have a sandbox to test configurations and new features.
    c. **Data Integrity**
        a. Data integrity across all systems must be maintained for specific data elements.
        b. Must ensure no data loss. Also, transactional integrity must be maintained.
    d. **Interoperability**
        a. The system should integrate with communication services to provide various message tracking (i.e., when the user reads the email) (nice-to-have-requirement).

e. **Manageability**
   a. The system must have various roles with different permissions or the ability to customize permissions/roles.
   b. The system should track or provide a report on changes made to the system and who made the changes for the last 90 days.

f. **Performance**
   a. The system must provide an average response time (in 95th percentile) for all user- based interactions/transactions.
   b. API service call must respond within 500 ms.
   c. Synchronous database request must respond within 500 ms.
   d. Document uploads have a goal of 5s. Poor network conditions or large document sizes may result in response times longer than 5s.
   e. The system should be horizontally scalable. The system capacity planning must be done taking into consideration current and future demands to sustain performance over time, including but not limited to document storage.

g. **Recoverability**
   a. Recovery Time Objective (RTO) - 4 hours
   b. Integrity between data and supporting artifacts need to be maintained. Transactional integrity as well as disaster recovery integrity.
   c. The system should be backed up on a regular predefined schedule, including immutability such that it may be restored to a working state.

h. **Reliability**
   a. The system must leverage redundancy for reliability.

i. **Scalability**
   a. The system should scale horizontally to handle increase in workload with the upper limit to optimize cost and scale down if workload decreases.

j. **Security**
   a. The system must confirm the validity of user authentication based on identity provider.
   b. The system must use industry-standard OpenID Connect (OIDC) for authorization of Application Programming Interface (API) requests.
   c. The system should only be allowed to be accessed via Identity Provider.
      i. Internal users through State Bar Azure AD.
      ii. External users through Azure AD B2C.
   d. The system should support role-based access control for different groups of users.
   e. The system should require multi-factor authentication for both internal and external users.
   f. The system must make use of Transport Layer Security (TLS) 1.2 or higher to encrypt all network traffic between clients and servers. All data in transit will be encrypted via TLS or Secure File Transfer Protocol.
   g. Sensitive PII and PCI data must be encrypted/masked/redacted.
   h. The system will provide a security audit trail on application and infrastructure access, user activity, and changes. Note: Functional requirements will specify minimum business-specific user audit requirements, such as capturing user's IP address. Overarching requirements will be defined to track events and actions.
   i. IT Internal Controls Assessment.

      j.   Provide a report of audit results through request or from a portal. Example: NIST 800-53.

      k.   Websites should be accessed anywhere excluding certain countries. The system must support configurable network access control. The system should prevent data scraping for nonpublic information.

      l.   The system must meet Open-Source Foundation for Application Security (OWASP)Top 10 vulnerabilities. Critical, High, and Medium security vulnerabilities should be addressed.

      m.   Lower environment should have scrubbed data. Tooling developed that allows this to be repeatable and fast.

      n.   Provide virus scanning of all uploaded documents. (i.e., Currently OPSWAT is used).

      o.   The system must meet NIST security guidelines.

      p.   The system should perform penetration tests regularly and provide reports.

      q.   Data should stay within U.S. servers.

      r.   The system will prevent data scraping and crawling.

k. **Usability**

      a.   Application must follow responsive web designs to allow usage on different devices and browsers. Should support HTML5 capable browsers. Should be accessible on Android and iOS platforms. All exceptions or user errors must be clearly communicated with actionable feedback and help.

      b.   The system navigation and summary must be familiar and consistent.

      c.   The System must meet ADA and WCAG 2.2 requirements or similar.

l. **Corporate and Legal Compliance**

      a.   Sensitive information (i.e. SSN, DOB) will need to be tokenized and masked during UI.

      b.   PII data needs to be handled appropriately according to the state and local law.

      c.   ADA compliant - to be in compliance with California Government Code Sections 7405 and 11135, and the Web Content Accessibility Guidelines 2.0, or a subsequent version, as published by the Web Accessibility Initiative of the World Wide Web Consortium at a minimum Level AA success criteria. https://www.ca.gov/accessibility/

m. **Data Management**

      a.   The system must not delete any record or document and keep them in accordance with the retention policy.

      b.   Current real time integrations - in and out of applications - with rest of the IT applications must be maintained (for real time data and archive data).

III. RESPONSE INSTRUCTIONS

The submission requirements for this RFI are set forth below. Respondents are solely responsible for all expenses associated with responding to this RFI.

A. Submission Requirements

1.   An executive summary of no more than five pages, providing an overview of the bidder's organizational structure, history, services, market position, unique qualifications, strategic alliances, etc.

2. Qualifications, background, experience and resumes of the project director and other staff proposed to work on the project.

3. A detailed description of the services, techniques, approaches, and methods to be used in in completing the project.

4. A detailed description of the chronology for completing the work, including a timeline and deadlines for each task and deliverables (as applicable). Timelines should be designed in weeks, in series starting from Week 1; all concurrent services should be clearly noted as such.

5. A detailed cost competitive estimate and answer the following questions:
   a. Can you provide examples of similar projects you've worked on, specifically public-facing websites for government agencies?
   b. What is your experience with developing websites that meet ADA compliance?
   c. What technologies, frameworks, and tools, including content management systems (CMS) do you typically use for web development projects of this scope? Why do you prefer these?
   d. What measures do you take to ensure website performance, such as load times, scalability, and performance during high traffic periods?
   e. How do you keep clients informed of progress and ensure the project stays on schedule?
   f. Describe project methodology and approach, including project phases and tasks.
   g. What risks are typically encountered in this type of project and how will you mitigate them?
   h. What steps do you take to maintain data security?
   i. How do you ensure the quality of your deliverables?
   j. In addition to deliverables noted above, what else do you typically provide to your clients?
   k. Provide your project assumptions.

6. A description of the history of work previously performed for other State of California agencies or State Judicial Branch Entities.

7. Confirmation that the bidder has all necessary business licenses, professional certifications, or other credentials to perform the services, and that the bidder, if a corporation, proof that it is in good standing and qualified to conduct business in California.

8. Any other information or suggestions you may have in providing services designed to meet stated project goals.

B. Questions Regarding the RFI
All vendor community communications concerning this RFI must be directed by email to Sunly.Yap@calbar.ca.gov no later than September 30, 2024.

C. Addenda

The State Bar may modify the RFI prior to the Submission Deadline by posting, mailing, emailing, or faxing an addendum to the bidders known to be interested in submitting a response.

D. Disposition of Materials

All materials submitted in response to this RFI will become the property of the State Bar and will be returned only at the State Bar's option and at the expense of the vendor. One copy of each response will be retained for the State Bar's official files and will become a public record pursuant to the California Public Records Act. By submitting a response, a bidder agrees to these terms and waives any right to pursue a cause of action for damages incurred as a result of the release of any information contained in a proposal.