



## Answers to 2026 Website Redesign RFP Questions

**Note:** Due to the high number and technical nature of some questions, 3CE will post additional answers sometime between January 12-16.

### 1/9/26 Website Redesign RFP Update:

**Please note RFP respondents DO NOT need to provide a Qualifications Package as part of their RFP submittal process** – there is no longer a January 14 deadline for any materials or documentation. Respondent must submit their Proposal by the original deadline of January 21 at 11:59pm.

Could you please clarify the distinction between the Qualifications Package and the Proposal? We note on Page 13 that the Qualifications Package is due on January 14 at 11:59 PM, and the Proposal is due on January 21 at 11:59 PM.

- The Qualifications Package is no longer required. Please submit your proposal on or before the original deadline of January 21, 2026 at 11:59 PM.

Can 3CE provide more specific details or prioritization for the desired customer self-serve features that require integration with the Salesforce-based CRM (e.g., is the priority a customer-service chatbot, the Energy Program Application Status portal, or account-management features)?

- The prioritization of these potential customer self-serve features has not yet been determined. Cost will likely play a role. 3CE recommends applicants consider assigning estimated costs or a cost range to one, or all the options on the table.

For the Content Strategy & Development phase, what is the anticipated split of labor for copywriting? For example, is the Vendor expected to generate 100% of the new and revised copy based on existing content and 3CE guidance?

- The majority of responsibilities re: copywriting will fall on the selected vendor: approximately 75% of copywriting responsibilities with the remaining 25% represented by 3CE labor such as providing: existing copy that needs to be refined, copywriting guidance; appropriate headers, section titles, page titles, approved nomenclature and/or definitions, etc.

Is a specific business license or business registration required to perform work under this RFP? If so, may the selected vendor obtain and provide the required license and business registration after contract award, or must it be submitted as part of the proposal?

- A specific business license or business registration are NOT required to perform work under this RFP.



Are there any requirements for in-person meetings either before or after the contract is awarded? If so, how frequently are these meetings expected to occur, and would it be acceptable to conduct some or all of these meetings virtually?

- As outlined in the RFP Important Dates, respondents should be prepared for in-person interviews at 3CE's Monterey office (70 Garden Court – Suite 300, Monterey, CA 93940) on January 30. 3CE will alert any vendors selected for in-person interviews on or before January 26.
- Aside from this in-person interview, 3CE anticipates possible in-person meeting(s) during discovery phase but likely not beyond the discovery phase.

Could you please clarify whether the required ongoing technical support, maintenance, and updates can be provided remotely, or if onsite support is mandatory under this contract?

- Yes, ongoing technical support, maintenance, and updates can be provided remotely.

Are there any preferred CMS platforms or hosting providers for Website Development?

- WordPress is the preferred CMS platform.

Are we permitted to provide references from the commercial or private sector?

- Yes, there are no specific requirements for references.

Is there an estimated or anticipated budget for this RFP?

- Not at this time

What evaluation criteria and scoring methodology will be used to assess the proposals?

- Please see Section 6 on page 11 of RFP

Is the Salesforce and 3CE data manager integration only through iFrame or needs connection through APIs or other methods too?

- We are not certain at this time but likely only through iFrame, with possibility API needs may be identified during redesign.

We see similar RFPs with budgets ranging from \$50K to six figures. Where in that range are you expecting to fall?

- That information is not available at this time.

What is your current annual spend on hosting and support for the site?

- Approximately \$60,000

Is there an organizational preference for open source vs. a proprietary CMS?

- WordPress is preferred



Is there a preference for any specific CMS? If yes, is that preference driven by familiarity, budget, perceived technical superiority or ease of use, or some other factor?

- Based on familiarity, **WordPress is preferred**

Please quantify the amount of content on the site? (number of pages, files, etc.) Do you expect all content to migrate to the new site?

- This is yet to be determined. Please refer to current website. We expect the new website to have less content.

Is the site theme custom or built on a standard base theme like Genesis?

- This is yet to be determined

Does the site search need to index the contents of pdf / Doc files?

- No

Please describe all third-party systems that integrate with the website via an API or an automated data import/export.

- Website Iframes for customers to opt out or change service offerings

Will single sign-on be used to control administrative access to the site? If yes, please elaborate.

- Yet to be determined

Where is the site currently hosted?

- Through Planeteria Media

What are the data storage requirements (files, database, etc.) for the site?

- Not available at this time

We are a US company with team members outside the US. Is there any limitation on their ability to work on the project?

- No

Does 3CE have a budget or range in mind for this project at the moment?

- Not available at this time

Does 3CE have a CMS of choice for this project yet?

- 3CE prefers WordPress



For the proposed Energy Program Application Status Portal, can you briefly describe what this should look like, and what sort of actions users should be able to take?

- The proposed portal would likely provide simple updates for 3-5 phases of application process. For example: 1) Application submitted, 2) Application under review 3) Application Incomplete or Ineligible – see email or open application 4) Application Approved – Rebate is Still Pending 5) Your Rebate check has been sent

Is there a budget range allocated for this engagement?

- Not at this time

The RFP mentions "simplifying" branding. Should we plan to work with existing brand assets, or would you like us to propose a rebranding initiative that includes discovery, strategy, and / or creative?

- Branding considerations within the website redesign will be guided by a brand and style guide document for reference.

You mention a content migration plan. Would you like the selected agency to handle a scripted and/or manual migration of existing content?

- Content will be a combination of new and migrated

Will you be attaching the winning vendor's RFP response to your form contract, or will the winning vendor have an opportunity to negotiate a scope of work to be attached to your form contract as Exhibit A?

- The awarded vendor may have an opportunity to negotiate scope of work after being selected

Can you provide guidance on the budget range or constraints for this project?

- Not at this time

What metrics (KPIs) will be used to measure the success of the redesigned website?

- A combination of subjective and objective assessments will determine the success of the redesigned website, but success will primarily be measured by staying on schedule and within proposed budget.

What pages/sections of the site and how many pages will the chosen vendor need to write copy for?

- Yet to be determined

What types of digital marketing projects or services will you be interested in on an ongoing basis? How many hours a month do you anticipate needing for the digital marketing retainer and support?

- Digital marketing needs are yet to be determined



Do you have any specific website enhancements in mind for future development that you anticipate needing as part of your monthly retainer? Do you need this retainer to serve as a catch-all for support, or do you have specific tasks in mind that you can share with us?

- The retainer is primarily a catch-all for support and potential updates that are beyond staff technical capabilities

What are the weakness points you face on your current website?

- See RFP

How many pages will be migrated?

- Yet to be determined

Is there any content creation (copywriting, editing, photography, video) included in the scope of this project? Will your writer/editor be providing all content that will be included in the launch of the site?

- As outlined in RFP and confirmed via answers to other questions, the bulk of copywriting will be the responsibility of the selected vendor with support from 3CE staff.

How many design concepts are you expecting the vendor to deliver?

- We are accustomed to seeing 2 or 3 options for projects like this.

What type of support and maintenance do you expect from the vendor? Is it on an as-needed basis, 24/7, or 5 days a week support?

- As needed during normal business hours.

What functionalities/tools are you looking for in your new website?

- This has yet to be determined.

Are there any specific training or documentation needs for your team to manage and maintain the new website? This information will help us propose a comprehensive solution that includes the necessary training and support.

- No, not beyond what is customary training and documentation.

Do you have brand guidelines and/or a style guide that you could share with us? What design assets will be provided? (e.g., logo, images, iconography)?

- Yes, the project will be guided by an updated brand/style guide as well as existing logo and imagery. New or updated iconography could be one of the outcomes of website redesign but is not a stated deliverable.

What do you know about your users?

- This question is too broad to be answered in this context. It will be discussed during interviews and the discovery phase as needed.



What are the primary goals of each audience for the website?

- Currently being summarized via surveys and feedback but in general: Ease of access, engagement, incentive to participate in programs, useful information

Appendices required: Can you confirm which appendices are required in our response (Appendix A, B, and/or C), and whether you prefer them embedded in the proposal PDF or provided as separate attachments?

- Appendices A, B, and C are required and preferred to be embedded in the proposal PDF.

What does “in-house editing/design capability” mean for 3CE in practical terms?

- Anything that would fall into basic to average WordPress skills.

For the “tracks” requirement (residential vs agricultural vs commercial), do you already have a defined model... or do you want the vendor to help define it during Discovery (personas, journeys, content routing, page templates, etc.)?

- We are open to redefining existing customer personas – whatever the origin; yes, they will help define journey, content routing, etc.

For the customer self-serve features (chatbot, account changes, program applications, application status), which components are expected to be embedded (existing tools) vs rebuilt as part of this engagement?

- Whichever features we decide upon will need to be rebuilt as part of this project.

Can you share details on the current frames that support account changes, program applications, or other customer actions (vendor/tool, login/auth method, ownership, known issues)?

- The only frames currently being used are Iframes as part of customer self-serve to opt-out of 3CE service or change from one service offering to another.

Which Salesforce products/implementations are in place today, and what does success look like for Salesforce integration (simple lead capture vs deeper workflows, routing, case management, status updates, reporting, etc.)?

- None are currently in place. Success will be defined through discovery, final scope, and early design.

Hyland–OnBase agendas: how is OnBase implemented today (embed/link-out), and what does “better integration” mean to 3CE (UX improvements, accessibility improvements, information architecture, search, etc.)?

- Embedded. At this time, “Better integration” refers to improved visual, accessibility, and search.



Search + archives: what format are rate tables and joint-rate comparisons today (PDFs, tables, database, third-party)? And for the webinar archive, where are videos hosted (YouTube/Vimeo/other) and what search/filter needs do you have?

- Rate tables and Joint Rate Comparisons are PDFs. Videos are hosted on 3CE's YouTube channel

Homepage/program page alerts: do you have requirements or constraints for banners/pop-ups (frequency, dismiss behavior, accessibility requirements), and should staff manage these via a simple admin interface?

- No specific requirements or constraints.

For ongoing support, do you have an expected monthly hour range... and what do you want included in "support hours" (content updates, new pages, feature enhancements, bug fixes, security updates, etc.)?

- 10-15 hours toward all of the above as needed

Do you have target response times (SLA expectations) for urgent vs non-urgent requests, and do you expect uptime/performance monitoring included?

- No

Pricing format: do you prefer pricing separated as (A) redesign/build and (B) annual hosting/support, with a not-to-exceed total for each... or a single all-inclusive total with line-item detail?

- Itemized pricing would be preferred

Local preference: how do you define "local" for this solicitation, and what documentation do you need for a vendor to claim local preference?

- "Local" refers to within 3CE's service area: Santa Cruz, San Benito, Monterey, San Luis Obispo, and Santa Barbara counties.

If a non-local prime partners with a local subcontractor, how (if at all) does that impact local preference scoring?

- Outside of hosting, we do not expect the selected vendor to subcontract much of the work and prefer when that is not the case.

Public Records Act: are there any sections you recommend vendors avoid including (or handle carefully) due to public disclosure expectations?

- No

Standard Services Agreement: where is it posted, and do you want redlines embedded in the main response PDF or included as a separate marked-up attachment?

- If you are redlining the SSA, please send as a separate document. The SSA is embedded into the RFP document.



When was the current website last refreshed, and what are the primary drivers behind the new redesign at this stage of 3CE's evolution (post-enrollment focus)?

- **Website was last refreshed in 2022. The main driver behind new website redesign is clearly outlined in the RFP.**

Does 3CE have an existing photo/video asset library, or should vendors plan for stock imagery, graphic creation, or visual asset curation?

- **Needed imagery and graphics will be a combination of existing library, stock, and graphic creation**

Are there specific visual elements or features (e.g., video usage, dashboards, maps, storytelling components) that 3CE considers high priority for the redesign?

- **Yes: video usage, maps, and storytelling components**

Are there specific pain points in the current site's navigation, performance, accessibility, or integrations that should be prioritized?

- **Please see RFP**

How does 3CE currently manage SEO and site analytics, and does the agency expect vendor support for SEO strategy, optimization, and reporting post-launch?

- **The current design did not involve much SEO strategy. We hope to integrate into new website along with optimization and expect post-launch reporting.**

Are there requirements or expectations for Spanish-language content workflows beyond automated translation (e.g., manual review or editorial control)?

- **Possibly within Spanish language versions of Energy Program applications**

Are the required PG&E and SCE Iframes considered existing, stable integrations, or should vendors anticipate modification, enhancement, or troubleshooting as part of scope?

- **Vendors should anticipate possible modification**

Is the interactive map, dashboards, and live metrics functionality expected to be phase-one deliverables, or candidates for phased implementation?

- **To be determined**

What key performance indicators will 3CE use to evaluate the success of the new website (e.g., improved engagement, reduced bounce rate, increased Energy Program participation)?

- **All of the above – those three will be some of the most important measures**

Are there specific search terms, service areas, or geographic regions where improved search visibility is a priority?

- **To be determined**



Does 3CE anticipate regular reporting on website performance as part of ongoing support services?

- Yes

Is the tentative timeline included in Appendix A still the target schedule, or does 3CE anticipate flexibility in sequencing or phased delivery?

- There may be some flexibility and/or phased delivery

Are there any external dependencies (regulatory, internal approvals, system availability) that vendors should account for when planning the project schedule?

- No

Does 3CE have an anticipated budget range or internal cost expectations to help vendors appropriately scale their proposed solution and level of effort?

- Not available at this time