

ADDENDUM 1
Issued Oct. 16 at 4 p.m. EST

All changes highlighted in red.



**Website Design, Content Migration, Hosting, and
Content Management System Services**

RESPONSES DUE: Oct. 29, 2026, 4PM EST

Township Response to Questions Submitted on Oct. 15, 2026

Does the Township have minimum coverage limits for commercial general liability, professional/errors and omissions liability, cyber liability, or other insurance that respondents should account for? What are the insurance requirements (types and minimum coverage)?

A Certificate of Insurance is not required with the proposal. The selected vendor will be required to provide evidence of commercial general liability and professional/errors and omissions liability coverage before contract execution. Minimum coverage limits are typical set at \$1 million per occurrence and \$2 million aggregate.

What are the number and type of references required?

See the RFP.

Could the Township identify the current third-party systems or vendors used for functions such as online payments/credit card payments, facility reservations, public records requests, meeting and agenda management, employment applications, emergency notifications, and other online services that may need to integrate with the new website? What CMS platform powers the current website? Understanding what's being replaced versus integrated will help us scope accurately.

- **Current Website/CMS:** Granicus
- **Online Payments/Credit Card Payments:** Authorize.net. We are satisfied with Authorize.net and would look for the selected vendor to integrate with our existing software, though alternative proposals or solutions will certainly be considered.
- **Public Records:** We do not have a software for public records. These are managed manually in an excel sheet. An online form allows for electronic submission of records requests, which can also be submitted in person, over the phone, etc. (per Ohio law). We are seeking a better software solution or integration with the new website, if possible.
- **Facility Reservations:** Laserfiche. If the proposing vendor has a CMS native solution or recommendation for a better solution, we would be very interested in alternatives.
- **Agenda & Meeting Management:** For meeting/agenda management, we use a combination of Laserfiche agenda item submissions and manual processes. We are seeking a better software solution or integration if possible.
- **Employment Applications:** Jazz HR. We are satisfied with Jazz HR and would look for the selected vendor to integrate with our existing software.
- **Emergency Notification:** We do not need the vendor to provide emergency notification software or integration, as this is not listed in essential functions.

Proposing vendors can integrate with existing software/systems (particularly those that we are satisfied with) or provide recommended alternatives (native to CMS or third-party) to be considered during the design and migration process.

In your response to *Section IV D: Strategy and Approach – Essential Functions Matrix*, simply indicate if you will be integrating with these existing systems, or recommending a native or third-party software to ensure these essential services are provided. The Township will work with the selected vendor to select preferred solutions. An example of a matrix is below. *Please note that this is meant as an example ONLY and it should not to be interpreted as the Township's preferred response:*

Essential Function	Is the function native to the CMS, third-party, or an integration with existing Township software?	Are all licensing and set up costs included in lump sum proposal? (Yes/No). If No, indicate what costs are excluded and why.
Online Forms	Native to CMS	Yes.
Online Payments	Integration with Township's existing Authorize.net process	Yes, set up costs for integration are included. No additional licensing costs are anticipated.
Public Records	JustFoia, third-party software	No, this is a third-party SaaS solution that requires custom quotes based on each client.
Facility Reservations	Integration with Township's existing Laserfiche process	Yes, set up costs for integration are included. No additional licensing costs are anticipated.
Calendars	Native to CMS	Yes.

Does the Township currently use software to prepare meeting agendas and packets, or are they prepared manually and posted as PDFs?

We use Laserfiche to submit agenda items, but everything else is manual processes. We would be very interested in reviewing alternative solutions, whether native to the proposed CMS or a third-party software solution.

How is Laserfiche used, and which integrations are required? Which Laserfiche products does the Township use, and should the website connect to Laserfiche Forms or WebLink?

Laserfiche is used for facility reservations, submitting agenda items, incident/injury forms, and submitting electronic permits to our zoning department. We will still maintain Laserfiche for use in our zoning department and for submitting incident or injury forms, regardless of which vendor is selected, which is why these functions were not included in the essential function list outlined in our RFP.

Laserfiche is very easy to integrate, as it is simply a link to a form, so we do not anticipate any challenges with maintaining integration with existing processes as part of this project.

We are most interested in finding alternatives for facility reservations and agenda/meeting management, as Laserfiche is not meeting all of our needs for these processes.

Is the public records request form on the current website connected to a separate system for tracking requests?

No, this is just an online form. We use a manual process to track public record requests and responses.

Does the Township expect the base proposal to include fully licensed solutions for these functions, or may respondents identify third-party or optional solutions and their associated costs within the Essential Functions Matrix?

Where possible, all anticipated costs should be included in your base proposal, including third-party software licensing or integration costs. Please indicate in your matrix and your lump sum fee proposal

what is included or excluded, or if any costs are unknown. A cost range is also acceptable where appropriate for third-party software solutions based on your past experience.

Does the township require a specific content management system, or are proposers free to recommend one?

We do not require a specific CMS.

Does the current contract end on a date that the new site's launch must meet?

We will renew the contract with the existing website service and CMS provider to allow for plenty of time to migrate to the new system. There is no specific website launch date set. We want it done right, so we will work with the selected vendor to set a reasonable project timeline.

Are there minimum requirements for uptime guarantees, hosting architecture, data center location, cybersecurity certifications, or data residency beyond those specifically stated in the RFP? What hosting, support, and maintenance terms are expected over the three-year initial term?

As indicated in the RFP, vendors should describe their hosting architecture, backup procedures, uptime commitments, outage response times, security patching, disaster recovery capabilities, and ongoing maintenance and support.

These services must be provided for the entire three-year term of the contract, but the provisions and service levels do not need to be the same for every year. These details can be finalized during contract negotiations with the selected vendor.

When it comes to minimum requirements, the Township prefers security practices aligned with recognized National Institute of Standards and Technology (NIST) frameworks or standards. Vendors should identify the specific frameworks or standards they follow, and any relevant security certifications, independent assessments, or validations. The Township also prefers that all Township data, including backups, recovery copies, and archives, be stored, processed, and maintained in geographically diversified facilities within the continental United States or U.S. Territories.

Any provider that stores, processes, or transmits payment card data must comply with applicable Payment Card Industry Data Security Standard (PCI DSS) requirements. Because the Township already uses Authorize.net for online payments, a new payment processing software need not be submitted if the vendor intends to integrate with our existing software.

Is there a budget range or not-to-exceed amount for this project? What is the budget range, and how is price weighted within "best value"?

The Township has budgeted up to \$100,000 for one-time costs, including initial website redesign, content migration, initial software licensing, set up, launch, and post-launch training/support.

Ongoing software, hosting, maintenance, and support costs will be budgeted separately after selecting the preferred vendor. Annual recurring costs will be finalized during contract negotiations.

Vendors should provide complete pricing as outlined in the RFP, including all one-time project costs and anticipated annual costs for the three-year initial term. Identify any third-party licensing fees, optional

services, and proposed annual increases. Final pricing and renewal terms will be addressed during contract negotiations.

Best value means selecting the proposal that best meets the Township's needs at a reasonable, competitive total cost, rather than selecting the lowest-priced proposal. Price does not carry a separate numerical weight in the published evaluation criteria, but it will be considered in determining best overall value after proposals are scored and reviewed before moving to the next stage of interviews.

Is an open-source CMS such as WordPress acceptable, provided the proposed solution satisfies all functional, security, accessibility, hosting, and support requirements outlined in the RFP?

Yes, we would consider open-source software provided it met all RFP requirements.

Section 3.2 describes an initial three-year contract with two optional one-year renewals, while Section 5.5 describes the initial term as the duration of the project with an option to extend for a mutually agreed period. Could you clarify the intended contract term for hosting, maintenance, and ongoing support?

The intended contract term will be a three-year contract with two optional 1-year renewal periods. For the purposes of the RFP process, please provide your standard service agreement to comply with *Section 5.5 Vendor Agreement*. Actual contract and renewal terms will be negotiated after selection.

For the agreement that respondents are asked to include with their proposals (Section 5.5), is the Township seeking the vendor's standard services agreement, or should respondents prepare a project-specific proposed agreement addressing the services in this RFP?

For the purposes of the RFP process, please provide your standard service agreement to comply with *Section 5.5 Vendor Agreement*. Actual contract and renewal terms will be negotiated after selection.

Could you please clarify the expectations regarding the vendor agreement, payment terms, termination provisions, liability and indemnification, and intellectual property ownership? Additionally, we would appreciate confirmation of any specific contractual requirements vendors should review, including the provision permitting termination with 30 days' notice.

For the purposes of the RFP process, please provide your standard service agreement to comply with *Section 5.5 Vendor Agreement*. Actual contract and renewal terms will be negotiated after selection.

Does the Township anticipate requiring an independent third-party accessibility audit or certification before final acceptance, or may the selected vendor demonstrate WCAG conformance through its own documented accessibility testing and remediation process?

No, a third-party accessibility audit or certification is not required. If the vendor would recommend such a service, please include it as an optional service/scope in *Section IV G: Other*.

Will the selected vendor be provided with administrative access, content exports, document/media archives, and other available resources from the existing website platform to assist with migration?

Yes.

Seeing that Granicus is your current website vendor, is there a preference to go with the current vendor?

We will select the vendor that offers the best value for the Township regardless of current vendor.

Are contract exceptions or redlines to the vendor agreement acceptable?

For the purposes of the RFP process, please provide your standard service agreement to comply with *Section 5.5 Vendor Agreement*. Actual contract and renewal terms will be negotiated after selection, and will certainly involve mutual review and redline/exceptions before finalizing the contract.

Approximately how many pages, documents, media files, and other content items does the Township anticipate migrating from the existing website? Should the vendor plan a full audit as part of discovery?

Unfortunately, the Township has not conducted an audit to provide an accurate estimate of the number of pages and documents on the current site that must be migrated. Based on a quick review of our navigation tree in the CMS, we estimate that we have approximately 200 core pages, but this excludes news and calendar items, as well as documents. Based on a review of our Google Analytics, there may also be a large number of pages that are no longer linked from the website's navigation but remain accessible through search engines or direct links.

The Township did complete a full accessibility compliance audit and implementation this year, so all critical accessibility compliance issues have been resolved to date.

The Township will work with the selected vendor during discovery, and will also work with the existing CMS service provider, Granicus, to conduct an audit if necessary to support the redesign project.

Could you share an approximate content volume for the current site, page count and number of documents/PDFs, along with current monthly traffic? This helps us plan migration and hosting appropriately.

See previous question for content volume information. Approximate monthly traffic is 20,000 sessions, or 11,000 engaged sessions, according to the Township's Google Analytics dashboard.

Will demos be mandatory at interviews, and with whom? Who sits on the evaluation team?

Interview questions, schedule, and requirements will be provided to vendors who score the highest based on the RFP's listed scoring criteria.

The evaluation and selection team consists of:

- Brianna Wooten, Director, Public Information Department
- Kevin Lavoie, Public Information Coordinator, Public Information Department
- Adam Inskeep, Multimedia Specialist, Public Information Department
- Alberto Garay, Administrative Professional, Administration Department
- Andrew Dannemiller, GIS Administrator, IT Department

What drove the RFP (complaints, audit, consolidation)?

There are a variety of reason, but we will not address these as part of the RFP Q&A process.

How does the Township define success?

Please reference the language already included in the RFP for our project requirements and goals. We will set more specific project requirements, goals, and success criteria collaboratively with the selected vendor, but will not seek to outline all of them in the RFP Q&A Process.

Does the Township operate any additional websites or subdomains that are in scope for migration?

No.

Is an extension to the RFP submission deadline possible?

The Township will extend the deadline for proposal submission to ***Thursday, Oct. 29, 2026 at 10 a.m.***

Proposals will still be submitted electronically, as outlined in the RFP.

The interview and selection timeline has been updated as well. Please review the full addendum.

The RFP specifies a single electronic PDF submission, but Section 4.1 evaluation criteria reference “number of copies” as a factor. Could you clarify whether any physical copies are required alongside the electronic submission?

Apologies. That was a copy and paste error. No hard copies are required.

The preferred project completion is fall of 2027. Is there a hard external deadline (e.g., current CMS support end date) that must be met?

No, there is no hard deadline for launching the new site. The Township will work with the selected vendor to set a reasonable project timeline. Please note we have revised the RFP to read “December of 2027” as our preferred completion timeline.

For the electronic submission via Dropbox or FTP link to you, is there a file size limit or required naming convention beyond the specified title format?

There is no file size limit or other naming convention beyond the specified title format.

Should the vendor remediate existing PDFs for accessibility, or only migrate them?

Vendors are not expected to remediate existing PDFs for accessibility, only migrate them. However, if a vendor would like to recommend or propose this service, please provide more information about your services or recommendations under *Section IV G: Other*. This would also be considered an Optional

Approximately how many staff members and departments will edit content on the new website?

Approximately five departments and 20 staff members will edit content on the new site. Staff members’ contribution levels and roles vary dramatically, with many only editing very specific website components. The vast majority of editing and upkeep is conducted by the Public Information Department, which has five team members.

Is the Township open to keeping an existing software solution (e.g., agenda/meeting management, records requests, facility reservations, etc.) and integrating it into the new website?

Yes.

Will the Township accept examples from public-sector, nonprofit and community-organization websites with comparable functionality if a vendor has fewer than five local government examples?

Yes. Please select the references and examples you feel best fit the Township's project.

Is a remote delivery model acceptable (virtual discovery, reviews and training via Zoom), with on-site visits available at the Township's request? Could you please confirm whether the Township expects any in-person discovery sessions, UX workshops, or stakeholder meetings? Section 3.4 mentions stakeholder engagement but does not specify the expected format.

Yes, remote delivery is acceptable, provided that the service level for the project is robust. We are okay with Zoom meetings or in-person meetings, as long as key stakeholders in our departments have an opportunity to give feedback on the early design direction. This will help the township ensure buy in on the final product and increase internal stakeholder satisfaction.

Could you please share an estimated page count or content inventory for the migration? As Township staff will be responsible for most of the content audit and cleanup, further clarification on the vendor's expected migration responsibilities would be appreciated.

We will mainly need help with auditing all the pages and content, then our staff will handle clean up prior to migration. We have already conducted a recent ADA compliance audit and implementation, so that should not be an issue. We can likely work with our existing vendor on the audit as well, so we anticipate the time/input from the selected vendor to be minimal in this respect.

SECTION I – PROPOSAL SCHEDULE

1.1 Proposal Schedule

Listed below is the RFP schedule; adjustments may be made based on the needs of the Township. Any changes to this schedule will be noted on the Township website.

Request for Proposals issued	Oct. 8, 2026
Questions due via email	Oct. 15, 2026
Distribution of answers to questions	Oct. 16, 2026
Proposals due - <i>No later than 4:00 p.m. EST</i>	Oct. 29, 2026
Virtual interviews, if required	Nov. 5, 2026
Preferred Vendor notified of intent to select	Nov. 9, 2026
Preferred Vendor recommended / Board of Trustees meeting	Nov. 17, 2026
Contract negotiations (<i>15 business days, excluding holidays</i>)	Nov. 17-Dec. 10, 2026
Estimated start date (contract signed)	Dec. 11, 2026

1.2 Questions & Addenda to the RFP

The last day for submission of questions is Oct. 15, 2026. All questions are to be sent to Brianna Wooten at BWooten@westchesteroh.org. Questions will be responded to and, if necessary, an addendum will be published on the Township's website on Oct. 16, 2026.

1.3 Proposal Submissions

By submitting a proposal, the vendor asserts that it is familiar with all terms and conditions of this RFP and is sufficiently informed in all matters affecting the performance of the work. The vendor also asserts that the proposal has been checked for errors and omissions and that all information provided is correct and complete.

Proposals must be complete, organized and responsive to the requested scope of work. Proposal submissions must be provided as a single PDF file and organized to correspond with SECTION IV – PROPOSAL CONTENTS & FORMAT outlined on **page 16** of this RFP. The electronic file must be titled: [VENDOR NAME] - Proposal for Website Design Services

Each vendor must submit their proposal electronically by 4:00 p.m. EST on Oct. 29, 2026.

No proposals will be accepted after this date and time unless the Township extends the deadline by written addendum. Proposals can be submitted electronically in two ways:

1. Via the Township Dropbox link here:
<https://www.dropbox.com/request/h528uwz572rt04eyblup>
2. Using an FTP site, provide a secure link to download the file to Brianna Wooten at bwooten@westchesteroh.org.

The Township reserves the right to reject any or all proposals or portions of them, to waive irregularities, informalities, and technicalities to re-issue or to proceed to obtain the service(s) desired otherwise, at any time or in any manner considered, in the sole discretion of the Township, to be in the Township's best interests. The Township may modify or amend any provision of this notice or the RFP at any time.

SECTION II – INTRODUCTION

2.1 West Chester Township Background

West Chester Township operates as a limited home rule government led by a publicly elected three-member Board of Trustees. The Trustees' four-year terms overlap, ensuring some consistency and experience at all times. A publicly elected Fiscal Officer provides fiscal oversight and accurate keeping of meeting minutes. The Board appoints the Township Administrator, who serves as the chief executive officer of Township operations.

The primary government consists of all funds, departments, boards and agencies not legally separate from the Township. For West Chester, this includes police, fire and emergency medical services, 911, road maintenance and repairs, parks, planning and zoning, economic development, cemeteries, and general administration. The Board of Trustees and Administrator have direct responsibility for these activities.

The Township's operating budget is approximately \$54 million. The Township fiscal year begins on January 1 and ends on December 31. The Township has approximately 260 full-time positions and about 40 part-time/seasonal positions.

The Township's existing website is used by residents, businesses, visitors, elected officials, media, vendors, job applicants, and Township staff to access services and public information, submit permits, fill out forms/applications, reserve facilities, view public notices, access public meeting materials, receive emergency updates, apply for employment opportunities, view and respond to bids, and request public records.

2.2 Mission Statement and Core Values

VISION

Two important criteria; ***where families grow and businesses prosper***, to which Township employees must be personally dedicated to doing their part in assuring perpetuity of this Vision for each Township resident and business.

MISSION

The mission describes what our customers must have available to them whenever they are in contact with a Township employee: ***we provide superb customer service with an emphasis on integrity, fiscal responsibility, and open communication.***

CORE VALUES

In order to demonstrate they possess the most important, or core, essence of service and a commitment to meeting the standards of this Township's workforce, each employee must constantly demonstrate their commitment to: ***seeking continuous and measurable improvement in our services defines us as valued employees of West Chester Township.***

2.3 Objective & Project Goals

West Chester Township is seeking proposals from qualified website design, development and content management system firms to provide professional website redesign, content migration, hosting, support and content management system services.

The selected vendor will fully redesign, rebuild and implement a modern local government website that improves public access to Township information, services, documents and communications. The project shall include website design, information architecture, content migration, content audit support, CMS implementation, staff training, accessibility compliance, hosting, maintenance, and ongoing technical support.

The final website must be modern, mobile-responsive, secure, accessible, easy to maintain, and designed specifically for local government communication and service delivery. The website must comply with all applicable legal requirements, including ADA Title II requirements for local government websites and mobile applications, using WCAG 2.1 AA as the required baseline and WCAG 2.2 AA preferred where feasible.

SECTION III – SCOPE OF WORK

3.1 Project Purpose

The Township website is one of the primary tools used to provide public information, customer service, transparency, and access to local government services. The current website contains a large amount of public-facing content, including department information, news, public notices, public meeting materials, forms, event information, vendor applications, bid opportunities, employment information, parks and facility information, economic development resources, public safety information, and general Township services.

The purpose of this project is to create a new website that improves the user experience, strengthens accessibility, simplifies content management, supports online services, and provides a more effective platform for public communication.

The Township seeks a vendor that understands the needs of local government and can provide both the technical platform and professional guidance needed to build a website that is useful, sustainable, secure, and compliant.

3.2 Term of Contract

The selected Vendor will enter into a three-year initial contract with the Township, with two optional one-year renewals, for a maximum of five years. Optional renewals will be upon mutual agreement by both parties. Below is an estimated timeline (subject to change).

Approval of preferred vendor by Board of Trustees	Nov. 17, 2026
Contract negotiations (15 business days, excluding holidays)	Nov. 17 - Dec. 10, 2026
Contract signed and approved	Dec. 11, 2026
Project kickoff/start date	Dec 2026/Jan 2027

The timeline for designing the new website and transitioning from the old website will be developed at the kickoff meeting in collaboration with the selected vendor. **The Township would prefer to have the project completed by Dec 2027, but there is no hard launch date.**

3.3 Scope of Work

A detailed overview of desired services and scope of work for the website redesign project is outlined below.

- A. Design Development:** Redesign the Township website to create a modern, professional, and mobile-responsive design. The user experience should be intuitive for residents, businesses, visitors and other public users. Redesign should also include:

- 1) Improved navigation, information architecture, and search functionality.
 - 2) Migration of existing website content to the new website, working with Township staff to identify outdated, unnecessary, duplicative or low-value content for removal, consolidation or improvement.
- B. Essential Functions:** The selected vendor shall provide, configure, or integrate modern online services necessary for effective local government website operations. At a minimum, these should include the following:
- 1) **Online Forms:** The website shall support online forms for public inquiries, service requests, registrations, applications and department-specific needs. Forms should allow for document, image and photo uploads where appropriate, route submissions to designated staff, provide confirmation messages or email notifications, support export or reporting of submissions, include spam prevention and security options (e.g., password protection), and meet accessibility requirements.
 - 2) **Online Payments:** The website shall support online payments through integration with the Township's existing credit card payment vendor ([Authorize.net](#)) or other approved payment provider. The vendor should describe how payment links, forms, invoices or transaction workflows can be embedded or integrated into the website, including any security, PCI compliance, accessibility, reporting, reconciliation or third-party cost considerations.
 - 3) **Public Meeting Agenda, Minutes and Meeting Management:** The selected vendor shall provide, configure or integrate a public meeting agenda, minutes and meeting management solution as part of the redesigned Township website. The solution may be native to the CMS, provided through a third-party integration or offered as an optional module, but the vendor must clearly identify how the functionality will be delivered, what costs are included or optional and what limitations may exist. The system should provide a modern, accessible and searchable public meeting center that supports agenda preparation, internal review, agenda packet creation, public posting, meeting management, minutes preparation, video or livestream access, archiving and public search for the Board of Trustees and other Township boards, commissions or public bodies.

The Township currently uses Laserfiche to submit agenda items for public meetings, which produces a rough draft agenda for the Board of Trustees, but much of this process is manual. The Township would welcome a new process or integration that improves the workflow around agenda creation, editing, meeting minutes, posting, and archiving.

- 4) **Public Records Request and Tracking:** The selected vendor shall provide, configure or integrate a public records request and tracking solution as part of the redesigned Township website. The solution may be native to the CMS, provided through a third-party integration or offered as an optional module,

but the vendor must clearly identify how the functionality will be delivered, what costs are included or optional and what limitations may exist. The system should provide a modern, accessible and secure public records request portal that supports online request submission, staff routing, internal tracking, requester communication, document upload, review and redaction, response deadlines, public release of records where appropriate, reporting, audit history and searchable access to completed or commonly requested records.

- 5) **Facility Reservations:** The website shall support online facility reservation requests, availability calendars and related public information for reservable Township spaces, parks, shelters, meeting rooms or other facilities. The vendor should describe whether the reservation process can support approvals, staff notifications, payments, calendar management, rules or terms of use, and potential integration with Laserfiche or other Township software if needed.
- 6) **Bid, RFP and RFQ Postings:** The website shall support a dedicated area for bids, RFPs, RFQs and other procurement opportunities. The system should allow staff to post project descriptions, deadlines, documents, addenda, contact information and status updates, and should allow users to search, filter, or subscribe to relevant opportunities.
- 7) **Employment and Job Postings:** The website shall support employment and job posting functionality for Township openings. **The Township currently uses Jazz HR for job postings, and would anticipate simply integrating this software into the new website.** ~~The system should allow staff to publish job descriptions, salary or hiring information, deadlines, application instructions and related documents, with the ability to organize postings by department, job type, status or closing date.~~
- 8) **Public and Legal Notices:** The website shall include a dedicated, searchable area for public notices, legal notices and other required postings. The system should allow staff to publish notices with effective dates, expiration dates, categories, attachments and related links, while maintaining an archive of past notices as appropriate.
- 9) **Calendars for Public Events and Facility Reservations:** The website shall support calendars for community events, public meetings, and Township programs, as well as calendars for facility reservations (e.g., parks shelters, Muhlhauser Barn). Calendar functionality should allow staff to create recurring or one-time events, include dates, times, locations, descriptions, and maps, and allow the public to search or filter events by type, department, location or date.

C. User Interface & Training:

- a) Provide a content management system that is user-friendly and intuitive for technical and non-technical staff. The system shall include reusable page

templates and content blocks that provide flexibility for department-level customization while maintaining consistent sitewide branding, navigation, accessibility and design standards.

- b) The selected vendor shall train Township staff on how to manage the website after launch, including administrators, content editors and department-level users. Training documentation and recordings of training sessions shall be provided as part of the base cost of service and shall not be treated as a separate cost.
- c) The Township prefers a CMS that provides appropriate administrator-level design and layout control, allowing authorized staff to make future updates to approved templates, page layouts, and content presentation without requiring a full website redesign or rebuild.

D. Compliance & Security:

- 1) The selected vendor shall provide or coordinate secure, reliable hosting for the Township website and CMS, including SSL/TLS encryption, regular backups, uptime monitoring, performance monitoring, security patching, disaster recovery and ongoing maintenance.
- 2) The selected vendor shall ensure that the website, CMS templates, vendor-created components and related services comply with applicable federal, state and local laws, regulations and ordinances, including applicable cybersecurity, privacy, public records and web accessibility requirements. The final website shall comply with ADA Title II web accessibility requirements and WCAG 2.1 Level AA, with WCAG 2.2 Level AA preferred where feasible.

3.4 Project Deliverables & Implementation Requirements

The selected vendor shall provide all professional services, technical work, project management, testing, training and support necessary to design, develop, launch, host and maintain a new West Chester Township website and content management system. The project shall include all work necessary to move the Township from its existing website to the new website with minimal disruption to public access, staff operations and existing online services.

At a minimum, the selected vendor shall provide project kickoff and discovery, stakeholder engagement with key Township departments and staff, review of the existing website structure and content, development of a new information architecture and navigation structure, a full website redesign with an integrated CMS, and an iterative design process that includes **a minimum of three initial design concepts** or options for Township review.

The selected vendor shall provide a content migration plan for moving approved content from the existing website to the new website. Township staff will conduct the majority of content audit and cleanup prior to migration to avoid carrying forward outdated, duplicative or unnecessary information. However, the selected vendor shall provide

guidance, recommendations and support where appropriate, including recommendations related to content organization, usability, redirects and accessibility.

The selected vendor shall complete accessibility testing and remediation, security testing, performance testing, browser testing and mobile testing prior to launch. The vendor shall also provide staff training, CMS documentation, launch support, post-launch issue resolution and ongoing hosting, maintenance, patching, monitoring and support.

The selected vendor shall provide a detailed project plan and timeline identifying major phases, milestones, deliverables, review periods, approval points, Township responsibilities and vendor responsibilities. The final project schedule shall be developed in coordination with the Township following project kickoff.

3.5 Licensing and Insurance Requirements

The selected vendor must ensure compliance with all applicable federal, state and local laws, regulations and ordinances related to the services provided under this RFP. This includes, but is not limited to, compliance with all applicable tax, labor and employment laws. The selected vendor shall be responsible for maintaining all licenses, subscriptions, certifications, permissions and third-party software rights necessary to design, develop, host, support and maintain the website and content management system. The vendor shall clearly identify any proprietary software, third-party platforms, plug-ins, integrations, subscription fees, renewal fees or licensing restrictions included in the proposal.

The selected vendor shall maintain appropriate insurance coverage for the services provided, which may include commercial general liability, workers' compensation, professional liability/errors and omissions, cyber liability and any other coverage required by the Township. The vendor may be required to provide certificates of insurance prior to contract execution and maintain required coverage throughout the term of the agreement.

SECTION IV – PROPOSAL CONTENTS & FORMAT

The following instructions describe the form in which proposals should be submitted. Responses to the following items will be used for proposal evaluation. Proposals which do not contain responses to each of the required items will be considered incomplete and may be rejected by the Township. Proposal documents should provide a straightforward, concise description of the vendor's capabilities to satisfy the requirements of this RFP. A response must be provided for each requirement or an assumption will be made that the vendor cannot accomplish the requirement.

A. Management Letter – The vendor must include a management letter outlining the contents of the response. An authorized representative of the proposing Vendor must sign the cover letter to verify the contents of the response. The letter must also incorporate the following:

1. A statement of commitment and indication of the level of involvement of the vendor throughout the redesign project and term of the contract.

2. A statement that the proposed solution will meet the requirements outlined in the RFP and/or a list of exceptions to the requirements in the RFP. (Note: The Township reserves the right to reject any proposal containing such exceptions, or to require modifications before acceptance.)
3. A statement indicating whether proprietary information has been included in the proposal.

NOTE: All information contained within the response will become part of the final contract.

B. Executive Summary – The vendor shall provide an Executive Summary that condenses and highlights the major components of the proposal. The Executive Summary should provide reviewers with a clear understanding of the proposed website redesign, content migration approach, CMS platform, hosting and support services, accessibility strategy, project timeline, training plan and ongoing maintenance model. The summary should be written in a manner that allows any reviewer to understand the overall proposal, proposed solution and value to the Township without needing to first review the full technical details of the submission.

C. Vendor Qualifications

1. **Vendor & Team Qualifications** – Provide an introductory statement or overview demonstrating the vendor's experience and expertise in website design, website development, content management system implementation, content migration, accessibility compliance, hosting, security, training and ongoing support. Include a brief description of the organization's history, ownership, organizational structure, location and primary areas of service. If subcontractors or third-party providers/partners will be used, provide a brief overview of each organization and clearly identify their role in the project.
2. **Team Qualifications** – Provide an organizational chart identifying the project team assigned to West Chester Township, including the project manager and key staff responsible for design development, content migration, training and ongoing support. Include resumes or brief professional biographies for key team members, as well as a description of any additional resources that will be used to complete the project.
3. **Similar Past Work** – Provide at least five examples that demonstrate the vendor's experience completing similar website redesign projects. Examples for local governments with similar accessibility, public records, document management and online service needs are preferred.
4. **Client References** – Provide at least three client references for which the vendor has provided the same or similar services within the last five years. In a table format, include the name of the organization, services provided, project dates, website URL, and the name, title, email address and telephone number of a person who can be contacted regarding the services provided.

D. Strategy and Approach to Provide Services – In this section, provide a comprehensive description of how the vendor will approach the website redesign, content migration,

hosting, training, and ongoing support services requested by West Chester Township. The proposal should align with the Township's goals for a modern, accessible, secure, mobile-responsive and user-friendly local government website, and should detail how the vendor will meet the objectives outlined in Section 3.3 – Scope of Work.

1. **Essential Functions Matrix:** The vendor must provide a matrix/table that clearly identifies how each Essential Function (Section A) in the Scope of Services (Section 3.3) will be provided. The matrix should clearly show whether the capability is native to the CMS, offered as an optional module, or provided through a third-party integration, as well as identify any included versus optional costs, licensing requirements, integrations, or ongoing support needs. **Integration with existing Township systems or software, as outlined in the Q&A section of Addendum 1, are acceptable.**

- E. **Project Plan and Timeline** – The proposal should describe the vendor's overall project approach from kickoff through completion, including major project phases, anticipated milestones, review periods, approval points, Township responsibilities, and key deliverables. Respondents should provide a realistic timeline using the anticipated project start date identified in this RFP. The timeline should address, at minimum, project kickoff/discovery, stakeholder engagement, information architecture development, design development, content migration, security and performance testing, staff training, launch preparation, go-live date, and post-launch support. The vendor should also identify any assumptions, dependencies, risks or limitations that could affect the project schedule. The timeline should be clear enough for the Township to understand how the vendor will manage the project, keep the work on schedule, and ensure a smooth transition from the existing to the new website.
- F. **Compliance & Security Approach** – The vendor shall describe the proposed hosting environment, backup frequency, recovery process, uptime commitments, response times for outages or urgent issues, security patching process, disaster recovery procedures, and any service-level expectations included in the proposal. The vendor shall also describe its accessibility testing process, and how accessibility and security compliance will be maintained after launch.
- G. **Other** – Based on the information provided in the RFP and your knowledge of the industry, please describe any services or technological enhancements not previously mentioned that should be considered for further improving the effectiveness of the Township's new website (one page maximum). Vendors are encouraged to include any innovative ideas, best practices, or technologies that could enhance the new website.

H. **Proposed Lump Sum Fee**

Vendors shall provide a detailed fee proposal that identifies the total cost to complete the website redesign, content migration, CMS implementation, hosting transition, training, launch support and any other services required by this RFP. The fee proposal should clearly identify the following:

1. **All one-time project costs, including costs for project discovery, stakeholder engagement, site design, set up, licensing, website launch, training and post-**

- launch support. The budget for one-time project costs is not to exceed \$100,000.
2. Recurring annual costs, including all software licensing costs, support and maintenance costs, third-party software licensing or subscription fees, and hosting costs. This will help the Township budget appropriately for recurring annual software and upkeep costs after the new website is launched.
 3. Optional services or additional scope excluded from the base fee (e.g., website content audit, ADA compliance certification, etc.)
 4. Hourly rates for any additional or future work that falls outside the scope of services outlined in this RFP.

Preferred Vendor will be selected based on BEST VALUE, including overall cost, vendor expertise, and the perceived quality of services and programs proposed.

I. Vendor Compliance Forms (After Selection)

Upon selection, the preferred vendor must complete and provide the following forms:

1. IRS W-9 Form
2. Independent Contractor Acknowledgement Form (PEDACKN) from the Ohio Public Employees Retirement System (OPERS)

OR

Vendor exempt letter stating that the vendor is exempt from PEDACKN form

3. ACH Authorization Form (Optional)

These forms are NOT required as part of the initial proposal submittal, but are provided for reference only. (See Appendix A.)

SECTION IV – EVALUATION FACTORS

West Chester Township will review all proposals to determine compliance with the requirements as specified in the RFP. Only proposals which, in the opinion of the Township, meet the requirements of the RFP will be further evaluated. Proposals that pass the preliminary review will be evaluated on how well the proposal meets the needs of the Township as determined by the vendor's response to each requirement listed in the RFP. It is important that the responses be clear and complete so the Township can adequately understand all aspects of the proposals.

4.1 Basis for Award

Proposals received in response to this request will be reviewed and evaluated by a team. The final selection will be based on the evaluation team's assessment of the respondents per the evaluation criteria below. The Township reserves the right to accept or reject any or all proposals on the basis of any or all these criteria or other criteria not included in the list. ***Virtual interviews and software/product demos may be scheduled if necessary on the dates listed in the schedule in SECTION I.***

Evaluation Criteria	Weight
Capacity to Deliver: Ability to meet the technical, business and functional requirements of this RFP, including website redesign, CMS implementation, content migration, essential website functions, integrations, hosting, support and long-term maintenance. Response should clearly demonstrate how the vendor will meet the Township's needs for a modern, accessible, secure, mobile-responsive local government website.	25%
Demonstrated Past Success: Expertise and qualifications of assigned staff, including prior experience completing similar website redesign projects. Experience with local government or public sector clients with similar accessibility, public records, document management, and online service needs.	20%
Project Plan & Implementation Approach: Feasibility, clarity and quality of the proposed project plan and schedule. Evaluation will consider the vendor's approach to kickoff, discovery, stakeholder engagement, design development, content migration, testing, staff training, launch, post-launch support and the amount of Township staff time required.	20%
Compliance, Accessibility and Security Approach: Strength of the vendor's approach to ADA/WCAG compliance, cybersecurity, secure hosting, backups, uptime monitoring, disaster recovery, privacy, public records considerations, testing and ongoing maintenance.	15%
Completeness and Quality of the Response: Response adequately addresses all requirements of RFP and complies with Section IV Proposal Contents & Format.	10%
Client References: References substantiate vendor's ability to deliver proposed services.	10%

4.2 Proposing Vendor(s) Interviews

Interviews and project or software demonstrations via Zoom may be conducted. These are scheduled to occur **on Nov. 5, 2026. Submitting vendors should hold this date on their calendar in anticipation of potential interviews.**

4.3 Common Questions and Answers

Q: *Is there a pre-bid conference?*

A: No. Questions can be submitted as outlined in SECTION I.

Q: *Will the Township grant an extension for submission of proposals?*

A: Unfortunately, extensions cannot be granted. The deadline will only change if the Township chooses to extend the deadline and issue any addenda via the website.

The deadline for submission has been extended to Oct. 29, 2026 at 10 a.m. EST.

Q: *Is the RFP available as a Word document?*

A: Yes, please reach out to bwooten@westchesteroh.org if you prefer the document in a Word format.

SECTION V – TERMS AND CONDITIONS

5.1 Electronic Documents

Proposing vendors may be supplied with the original RFP documents in electronic form to aid in the preparation of proposals. By accepting these electronic documents, vendors agree not to edit or change the language or format of these documents. Submission of a proposal by vendors signifies full agreement with this requirement.

5.2 Receipt of Proposals

The submitted proposal must be received by the Township prior to the time and date specified. The mere fact that the proposal was dispatched will not be considered; the proposing vendor must ensure the proposal is actually delivered by the deadline outlined in the proposal submission guidelines. Regardless of cause, late qualifications will not be accepted and will automatically be disqualified from further consideration.

Vendors may withdraw their proposals by sending a written request to Brianna Wooten at bwooten@westchesteroh.org.

5.3 Questions and Inquiries

Questions and inquiries regarding the RFP must be submitted via email to: Brianna Wooten at bwooten@westchesteroh.org. Proposing Vendors may not contact any other Township official, employee, vendor or customer to gather information about this RFP.

All questions must be submitted by Oct. 15, 2026. All questions and answers will be posted to the designated RFP webpage and/or emailed to vendors directly by Oct. 16, 2026.

5.4 Township Prerogative to Accept/Reject Proposals

The Township reserves the right to accept or reject any or all proposals as a result of this request, to negotiate with all qualified sources, or to cancel, in part or in its entirety, this RFP if found in the best interest of the Township. All proposals become the property of the Township. This RFP creates no obligation on the part of the Township to award the contract to any proposing Vendor for any reason. The Township reserves the right to award the contract based on proposals received without further discussion or negotiation. Proposing Vendors should not rely upon any discussions as an opportunity to alter their proposals.

If contract negotiations cannot be concluded successfully, the Township may negotiate a contract with the next highest scoring vendor or withdraw the RFP.

There is no express or implied obligation for West Chester Township to reimburse proposing Vendors for any expenses incurred in preparing proposals in response to this RFP; and West Chester Township will not reimburse proposing Vendors for these expenses, nor will the Township pay any subsequent costs associated with the provision of any additional information or presentation, or to procure a contract for these services.

5.5 Agreement

For the purposes of the RFP process, please provide your standard service agreement as a starting point for contract negotiations. The agreement shall be for three-years and will include all one-time services for launching the new website with necessary integrations, and should include two optional 1-year extensions.

Proposals must include a copy of the proposed vendor agreement. The selected Vendor will be required to enter into an agreement, which will include the requirements of this RFP as well as other requirements. The initial term of the agreement will be the duration of the project with the option to extend the agreement for a mutually agreed upon term.

The Township expects, but does not guarantee, that the decision on selection of an Vendor will be made on the date indicated in the Proposal Schedule.

5.6 Communication

Prospective Vendors shall communicate only with the staff identified herein during the entire RFP process (from solicitation to award). The Township will not be responsible for any verbal or non-verbal communication between a potential bidder and any other employee of the Township; and such action may be cause for rejection of the proposing vendor's proposal. Only completed proposals received by the deadline will be considered.

5.7 Company Ownership/Management

Should there be a change in the awarded vendor's ownership or management, the contract may be canceled unless a mutual agreement is reached with the new owner or manager to continue the contract with its present provisions and prices. This contract is nontransferable by either party.

5.8 Disclosure

All proposals accepted by West Chester Township shall become the exclusive property of the Township. Upon opening, there will be no disclosure of contents to competing Vendors, and all proposals will be kept confidential during the negotiation process. All proposals will be open for public inspection after the contract award. Material designated by the Vendor as a confidential trade secret shall accompany the bid and shall be readily separable from the bid response in order to facilitate public inspection of the non-confidential portion of the bid response. However, prices and terms of payment shall be made available for public inspection regardless of any designation to the contrary.

5.9 Revision to the RFP

West Chester reserves the right to revise the RFP prior to the date that proposals are due. Revisions to the RFP shall be posted on the West Chester Township website. West Chester reserves the right to extend the date by which the proposals are due. This RFP does not commit West Chester to award a contract, to defray any costs incurred in the preparation of a proposal pursuant to this RFP, or to procure or contract for work.

5.10 Award of the Contract

Award of the contract shall be made to the responsive and responsible Vendor whose proposal is determined to be the best value offer, taking into consideration the relative importance of factors set forth in this RFP. The proposal contents of the successful vendor will become, at the Township's option, a contractual obligation if a contract ensues. Failure of the successful bidder to accept this obligation may result in cancellation of the award. Proposals submitted are offers only and the decision to accept or reject is a function of quality, reliability, capability, reputation, and expertise of the proposing Vendors. The Township reserves the right to terminate the selection process at any time and to reject any or all proposals.

The Township reserves the right to accept the proposal that is, in its best judgment, the best and most favorable to the interests of the Township and to the public; to reject the low price proposal; to accept any item of any proposal; to reject any and all proposals and to waive irregularities and informalities in any proposal submitted or in the proposal process, provided, however, the waiver of any prior defect or informality shall not be

considered a waiver of any future or similar defect or informality. Proposing vendors should not rely upon or anticipate such waivers in submitting their proposal.

The vendor to which an award is made will execute a written contract with the Township after Notice of the Award has been sent. If the Vendor to which an award is made fails to enter into the contract within 15 business days following the award, the Township reserves the right to nullify the award and an award may be made to the next best proposing Vendor as determined by the Township.

The contract will provide that the Township reserves the right to terminate the contract at any time upon 30 days prior written notice of intent to terminate the contract.

5.11 Addenda

Any addenda to the RFP specifications issued during the period between issuance of the RFP and receipt of proposals will become a part of the RFP.

5.12 False or Misleading Statements

If, in the Township's sole discretion, a proposal contains false or misleading statements or references that do not support a function, attribute, capability, or condition as contended by the vendor, the entire proposal may be rejected at the discretion of the Township.

5.13 Clarification of Proposal

The Township reserves the right to obtain clarification of any point in a vendor's proposal or to obtain additional information necessary to properly evaluate a particular proposal. Failure of a vendor to respond to such a request for additional information or clarification may result in rejection of the vendor's proposal. Vendors submitting proposals may be requested to make oral presentations as part of the evaluation process.

5.14 Responsiveness

Proposals should respond to all requirements of this RFP to the maximum extent possible. Vendor proposals are asked to clearly identify any limitations or exceptions to the requirements inherent in the proposed system. Alternative approaches will be given consideration, if the approach clearly offers increased benefits.

5.15 Rejection of Proposal

Proposals that are not prepared in accordance with these instructions to vendors may be rejected or disqualified. If not rejected, the Township may demand correction of any deficiency and accept the corrected proposal upon compliance with these instructions to proposing Vendors.

VI. APPENDIX A

IRS Form W-9

Form W-9 (Rev. October 2018) Department of the Treasury Internal Revenue Service		Request for Taxpayer Identification Number and Certification		Give Form to the requester. Do not send to the IRS.
► Go to www.irs.gov/FormW9 for instructions and the latest information.				
Print or type. See Specific Instructions on page 3.	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.			
	2 Business name/disregarded entity name, if different from above			
	3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.			
	☐ Individual/sole proprietor or single-member LLC ☐ C Corporation ☐ S Corporation ☐ Partnership ☐ Trust/estate			
	☐ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ► _____			
	Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.			
	☐ Other (see instructions) ► _____			
4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):			Exempt payee code (if any) _____	
			Exemption from FATCA reporting code (if any) _____	
			(Applies to accounts maintained outside the U.S.)	
5 Address (number, street, and apt. or suite no.) See instructions.			Requester's name and address (optional)	
6 City, state, and ZIP code				
7 List account number(s) here (optional)				
Part I Taxpayer Identification Number (TIN)				
Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see <i>How to get a TIN</i> , later.				
Note: If the account is in more than one name, see the instructions for line 1. Also see <i>What Name and Number To Give the Requester</i> for guidelines on whose number to enter.				
Part II Certification				
Under penalties of perjury, I certify that:				
1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and				
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and				
3. I am a U.S. citizen or other U.S. person (defined below); and				
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.				
Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.				
Sign Here		Signature of U.S. person ►		
		Date ►		
General Instructions				
Section references are to the Internal Revenue Code unless otherwise noted.				
Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9 .				
Purpose of Form				
An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.				
• Form 1099-DIV (interest earned or paid)				
• Form 1099-DIV (dividends, including those from stocks or mutual funds)				
• Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)				
• Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)				
• Form 1099-S (proceeds from real estate transactions)				
• Form 1099-K (merchant card and third party network transactions)				
• Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)				
• Form 1099-C (canceled debt)				
• Form 1099-A (acquisition or abandonment of secured property)				
Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.				
If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.				

Cat. No. 10231X

Form **W-9** (Rev. 10-2018)

Ohio Public Employees Retirement System
277 East Town Street, Columbus, Ohio 43215-4642

STEP 3: Acknowledgment

The public employer identified in Step 2 has classified you as an independent contractor or another classification other than a public employee. Ohio law requires that you acknowledge in writing that you have been informed that the public employer identified in Step 2 has classified you as an independent contractor or another classification other than a public employee for the services described in Step 2 and that you have been advised that contributions to OPERS will not be made on your behalf for these services.

If you disagree with the public employer's classification, you may contact OPERS to request a determination as to whether you are a public employee eligible for OPERS contributions for this service. Ohio law provides that a request for a determination must be made within five years after you begin providing personal services to the public employer, unless you are able to demonstrate through medical records to the Board's satisfaction that at the time the five-year period ended, you were physically or mentally incapacitated and unable to request a determination.

By signing this form, you are acknowledging that the public employer for whom you are providing personal services has informed you that you have been classified as an independent contractor or another classification other than a public employee and that no contributions will be remitted to OPERS for the personal services you provide to the public employer. This acknowledgment will remain valid as long as you continue to provide the same services to the same employer with no break in service regardless of whether the initial contract period is extended by any additional agreement of the parties. You also acknowledge that you understand you have the right to request a determination of your eligibility for OPERS membership if you disagree with the public employer's classification. **A copy of this form must be sent to OPERS.**

Signature _____ Today's Date ____/____/____
Do not print or type name

West Chester Township Vendor Letter (Vendor Exempt Form)



WEST CHESTER TOWNSHIP
FINANCE DEPARTMENT
9113 Cincinnati-Dayton Road
West Chester, OH 45069-3840

T | 513-777-5900
F | 513-779-9369
westchesteroh.org

April 30, 2024

RE: Required Vendor Forms

Dear Prospective Vendor:

West Chester Township is pleased that you wish to do business with us. In order to set-up your business as a Township vendor, there are two forms that the Township requires. An IRS W-9 and **either** the OPERS Non-Member Acknowledgement form (PEDACKN) from the Ohio Public Employees Retirement System (OPERS) **or** this letter stating that you are exempt from the PEDACKN form.

The Non-Member Acknowledgement form from OPERS is to be completed if you are an individual who begins providing personal services to a public employer on or after January 7, 2013, but are not considered by the public employer to be a public employee and will not have contributions made to OPERS. (If you're a vendor with less than five employees, and even if you have been assigned a Federal Tax Identification Number or Employer Identification Number, you must complete the OPERS Non-Member Acknowledgement form (PEDACKN)).

If you meet one of the following criteria, you are exempt from completing the OPERS Non-Member Acknowledgement form (PEDACKN). Please indicate the reason you are exempt and return this signed letter to us.

- ☐ a student who filed an [OPERS] exemption
- ☐ a college or university employee eligible and electing to participate in an Alternative Retirement Plan (ARP)
- ☐ performing services through a business entity with five or more employees
- ☐ government entity with more than five employees doing business with West Chester Township
- ☐ individuals or businesses that solely supply goods and will not provide any personal services to the Township
- No individual employed by the vendor will be classified as a public employee due to the provision of goods called for by the agreement between the vendor and the Township;
- No contributions will be remitted to OPERS for the vendor or individuals employed by the vendor for goods provided to the Township.

Please indicate if you are an OPERS (Ohio Public Employees Retirement System) contributor/recipient with a retirement benefit by circling one option: YES or NO If YES, PEDACKN must be filled out and indicate date and entity of employment below

Vendor Name

Date

Signature

Name Printed

Form(s) can be faxed to: 513.779.9369 or emailed to fkrutka@westchesteroh.org

Please note we will not be able to process purchase orders or checks for goods or services until these forms have been completed and returned.

West Chester has the ability to process payments using ACH transactions. If you would like us to process your payments electronically, please complete the attached ACH Authorization Form.

Thank you for your prompt attention to this matter. We look forward to our continued business together.

ACH Authorization Form



WEST CHESTER TOWNSHIP
FINANCE DEPARTMENT
9113 Cincinnati-Dayton Road
West Chester, OH 45069-3840

T | 513-777-5900
F | 513-779-9369
westchesteroh.org

ACH Authorization Form

I hereby authorize West Chester Township to initiate entries to the checking/savings account at the financial institution listed below, and if necessary, initiate adjustments for any transactions credited/debited in error. This authority will remain in effect until West Chester Township receives notification in writing to cancel Automated Clearing House payments in such time to afford West Chester Township and the financial institution a reasonable opportunity to act on it.

Vendor Name (Please Print)

Email Address (required) for payment notification (Please Print)

Name (Please Print)

Address (Please Print)

Name of Financial Institution (Please Print)

Address of Financial Institution - Branch, City, State, Zip (Please Print)

Signature

Date

Financial Institution Routing Number

Checking/Savings Account Number
(Circle One)

These Numbers are located in the bottom of your **check** (not a deposit slip) as follows:

⑆ 1234567890 ⑆ 1234567890123 ⑈

Routing Number

Account Number

*A Fee of \$25.00 will be charged to your account if funds are unavailable at time of transfer.

Remittance notifications will be from email address Gemstone@westchesteroh.org, be sure to add to your contact list.

Office Use Only	
Vendor #	
Date Entered	