

Report of the LAUC Statewide Web Redesign Committee (2014-15)

To: Matt Conner, LAUC President

From: Julie Lefevre, Chair, Web Redesign Committee

In May 2014 LAUC President Nick Robinson charged a committee with planning and managing the development of a new LAUC website.

Committee members

- Julie Lefevre (Berkeley), chair
- Carla Arbagey (Riverside)
- Letha Goger (Merced)*
- Jenny Reiswig (San Diego)
- Jerrold Shiroma (Merced)
- Michael Yonezawa (Riverside)

* Letha Goger left her position at Merced midway through the project.

Committee charge

The charge from LAUC President Nick Robinson included the following elements:

- Prior to implementation, the initial responsibilities of this working group include:
 - Write a detailed project scope statement including:
 - Key deliverables
 - Requirements
 - Wish-list features
 - A timeline for the project
 - Determine costs and timeline related to migration
 - Obtain estimates from outside consultants for website development
 - Oversee engagements with outside vendors or contractors, if used
- During implementation, the working group will:
 - Design and build a new LAUC website in Drupal. (Aspects of the Drupal site, including its design, or the entire site build, may be contracted out, in which case the working team will oversee that work.)
 - Coordinate training for users who will be migrating or developing content on the new site.

- Update web maintenance best practices for LAUC members to suit the capabilities and limitations of Drupal.
- Propose revisions to LAUC Website Policies and Procedures (<http://lauc.ucop.edu/about/wwwpolicy.html>).

The charge also included a target timeline of approximately six months from date of charging the ad hoc to website launch. Due to a variety of factors, the committee's work took longer than the original estimate (see "Challenges," below).

Project goals

A main goal of the redesign was to raise the profile of UC librarians to the larger library community and the general public, as well as to make LAUC resources more accessible to member librarians. An additional objective was to give the site a more contemporary and appealing look, and to replace the outdated web architecture with a robust content management system.

Initial Work

The committee initially discussed options for the content management system, including Wordpress and Drupal. We decided on Drupal for the following reasons:

- It is a free, open-source content management system, and a flexible framework for creating dynamic and scalable websites.
- Drupal allows multiple users to contribute and edit content, without necessarily having to know HTML or other web technology.
- Drupal has a large community of users and developers, which provides lots of opportunities for learning and support.
- Wordpress has known issues with security, which made us reluctant to commit to it.

The committee then wrote a detailed project scope, which formed the basis of our Request for Proposals (see attachment). The RFP included the following elements:

- Key deliverables
- Requirements
- Wish-list features
- A timeline for the project
- Project budget

We invited bids from five web development firms (all local to Berkeley, in case in-person meetings with the chair were desired): Chapter Three, Project 6, Five Paths, Giant Rabbit, and Rolling Orange. We received proposals from Project 6, Five Paths, and Giant Rabbit. The committee evaluated each of the three proposals and discussed them during a conference call on July 28, 2014. We used an evaluation matrix (see attachment) to judge how each proposal responded to the parameters defined in the RFP,

as well as cost and proposed timeline. After consulting references, we recommended Five Paths as the web development vendor on this project. Their bid was \$28,000 (just under the RFP's stated limit of \$30,000) with a timeline of 8-10 weeks (proposal included as an attachment).

Implementation

The committee began working with Five Paths in mid-September 2014, starting with a content audit to determine the amount and type of content to be migrated. Upon completion of the content audit, Five Paths began building wireframes -- simple designs showing basic layouts of the proposed site. On conference calls and through email, the committee reviewed three rounds of wireframes and provided feedback. In late October, Five Paths produced the first versions of design mockups to show font, color, and layout for the site. Through another iterative process of feedback and refinements that included five rounds of mockups, the committee arrived at a final design version in November. These final designs were shared with the Executive Board at the December 2014 meeting.

Five Paths began building the site in Drupal in January 2015, and the committee tested initial versions of the site and gave feedback on functionality and design. Content migration began shortly thereafter, in February 2015, and continued throughout the spring.

Due to the committee chair being away on medical leave for nearly six weeks, the project took an unintended hiatus in February and March. Content migration and functionality refinements continued in April and May. Another hiatus occurred in the month of June, when the web developers were away for four weeks. The website was completed in July, and officially launched on August 4, 2015.

Meet Our Members

In addition to migrating existing content into the new site, the redesign committee was charged with implementing the recommendations of the Executive Board Subcommittee on Meet Our Members by developing a new section of the site called "Meet our Members," designed to highlight members who exemplify the diversity and accomplishments of LAUC members.

The content for this section was developed by the Diversity Committee, chaired by Carla Arbagey, who was also a member of the redesign committee. Carla acted as the liaison from that committee to the web development team to fine-tune the content and display of the new section.

Content Management System

The site had long been hosted on the servers of the University of California, Office of the President (UCOP), but the UCOP web service was not able to host the site as a Drupal installation, so the new site was developed on an outside web hosting service (ServInt) and a DNS change was implemented to route the existing URL to the new host.

Drupal will allow multiple users to access the site to add or edit content, an improvement from the UCOP server, which only allowed one administrator on one machine to access the site via SFTP.

Challenges

The original charge proposed a timeframe of approximately six months for the project, to culminate in a launch date of December 2014. Several events prevented the project from progressing at that rate.

- Funding for the project had to be transferred to the Berkeley Library Business Office for disbursement to the vendor. This transfer was complicated and took several weeks after the committee was charged. There was also a delay in getting the vendor's contract approved with the Business Office.
- The design phase included a total of eight sets of wireframes and mockups that had to be reviewed by the committee. Scheduling enough time for each committee member to review and provide feedback in each design round extended the schedule.
- The chair experienced a major health issue and was away from work on sick leave for nearly six weeks.
- The web development vendor had scheduling conflicts and could not work on the LAUC project continuously.

Completion of work

The new site went live on August 4, 2015. At the recommendation of the committee, this was a "soft launch" -- not widely announced -- to give the Executive Board and the committee the chance to review the site and make any necessary adjustments. At the Executive Board transition meeting on August 17 at UCLA, the web redesign committee chair presented the site to the incoming Board, and 2015-16 LAUC President Diane Mizrachi discharged the committee. The site was officially announced to the LAUC membership on October 1, 2015.

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Librarians Association of the University of California

Request for Proposals

Website Redesign and Development

JUNE 2014

1. Summary

The Librarians Association of the University of California (LAUC) is accepting proposals to design and develop the Association's website. The purpose of this RFP is to provide a fair evaluation for all candidates and to provide the candidates with the evaluation criteria against which they will be judged.

2. Organization Overview

The Librarians Association of the University of California (LAUC), founded in 1967, is a statewide organization of all librarians employed at least half time by the University. The objectives of LAUC are to advise the University on professional and governance matters, to make recommendations concerning the UC librarians' rights, privileges and obligations, and to promote full use of UC librarians' professional abilities. Perhaps LAUC's most important function is the advice it provides to the system-wide, campus and library administrations on the best course for the University's libraries.

The organization's membership includes 449 librarians on ten campuses throughout the state.

The LAUC website is the primary mode of communication about LAUC's activities and policies. The site includes procedures, minutes, committee rosters, resources, and links to relevant documents on other sites. It is the main public face of the organization, and the primary source of current and archival information on policies, committee work, and member research.

The site is currently hosted by the UC Office of the President (Oakland), and is maintained by a librarian at UC Berkeley. The LAUC web administrator is an appointed limited-term position that rotates among librarians at different UC campuses.

3. Project Overview

The website was started in the early 2000s with a few basic HTML pages and has grown over time under the management of a succession of web administrators who have introduced some PHP and scripting, but the code and design is inconsistent across the site. The site design is outdated, navigation is not user-friendly, and the underlying architecture makes it difficult to implement new content areas or add dynamic content. Overall, the site doesn't accurately reflect the current expertise and interests of LAUC members.

The recent appointment of a new web administrator is an opportunity to assess the current architecture, platform, and hosting arrangement. Additionally, the Executive Board has begun planning for new content on the website that will showcase the activities of LAUC members and be directed towards an audience of non-members as well as members.

The web redesign project team includes six librarians from four UC campuses (Merced, Riverside, San Diego, and Berkeley). We meet regularly via conference call, and have ongoing communication through project management software (Asana).

4. Project Goals and Objectives

Our goals are to redesign the website to raise the profile of UC librarians to the larger library community and the general public, as well as to make LAUC resources more accessible to member librarians. We want to give the site a more contemporary and appealing look, and to replace the architecture with a robust content management system (Drupal).

Specifically, the redesign project team has these primary goals for improving the LAUC site:

- create a visually distinct home page that is inviting and interesting to both UC librarians and the general public
- improve navigation menus and terminology to better reflect typical user needs
- provide better branding of LAUC as a diverse and dynamic organization of forward-thinking information professionals
- move the site to a new hosting environment to facilitate administrative accessibility and shared governance
- redesign secondary pages to accommodate dynamic, timely content and more images

Our project objectives are:

- a website that is visually compelling and functionally accessible, including on mobile devices
- a web content structure that is flexible and modifiable, and allows content to be easily updated by non-technical staff
- website content that accurately represents the UC librarians' multi-faceted agenda of public service, instruction, and research

The site has a variety of audiences and users:

user	information need
UC librarians	information about LAUC policies and procedures information about work being done by UC librarians
non-UC academic librarians	information about governance policies of UC librarians information about work being done by UC librarians
potential UC librarian (job candidate)	salary and promotion scales work projects and research opportunities at UC libraries

community / general public	profiles of UC librarians and their contributions to higher education in California
UC faculty	subject specialties of UC librarians
media / journalists	expert commentary from UC librarians on topical information issues

5. Technical Parameters

The site uses HTML and CSS, and links to reports in PDF and Word formats. A few pages use PHP to populate header/footer content. It does not include a search engine, a back-end database, or dynamically generated content. Files in PDF format dominate the site, both in count and size. The following table lists the top three file types on the site:

Type	count	Σ size	% count	% size
PDF	332 URLs	216112 KB	39.49%	88.19%
HTML	241 URLs	2269 KB	28.62%	0.93%
MS Word	216 URLs	9992 KB	25.65%	4.08%

We will maintain our current domain name, lauc.berkeley.edu, but we anticipate migrating the site to a commercial hosting service.

The LAUC web administrator will remain the primary overseer of site content. With a new CMS-based site, the administrator will eventually authorize other LAUC members to upload content to specific areas.

We are seeking a consultant who will build a Drupal infrastructure based on our needs, and assist us with the design and visual layout of our content. The consultant will collaborate with us on developing an information architecture and a plan to migrate existing content to Drupal. The LAUC web redesign team will be responsible for managing content migration and creating any new content. Several members of the web redesign team are familiar with site-building and content management in Drupal.

LAUC will retain ownership of all project files once the site is completed, including custom coding, image work, and theme customization.

6. Usability Requirements

The website is the public face of UC librarians and so should be designed to be accessible and inviting to the general public. The site is also the primary mode of communication about LAUC's activities and policies, and as such is heavily used by LAUC members throughout the UC system. Other users include UC-affiliated faculty and academic librarians at universities and colleges throughout the U.S.

As with all library resources, LAUC content should be accessible to all users, whether online or in person. Specific ADA web guidelines should be followed in designing the LAUC site.

7. Functional Parameters

We want to create a website structure that is flexible enough to accommodate requests for new content formats and web technologies and can be easily updated by non-technical staff.

In addition to a standard Drupal configuration, we are interested in these specific features:

- responsive design
- embedded media
- social media integration
- online application functionality
- event registration forms
- document management functionality
- calendaring system
- LAUC member directory
- site search

8. Proposal Directions

Responses should include:

- information on your company's location, history, size, specialty, and design philosophy
- an outline of your typical process of designing a website from start to finish
- an estimate of how long it will take to complete a project of this scope
- names, email addresses, phone numbers and contact people at three organizations who have been clients during the last 18 months, whom LAUC can call on as references

Please also include links to a portfolio of related projects. These should:

- include a short description of the client's design needs/problems and how you resolved the challenge
- demonstrate that you have worked on a project of this scope (content-heavy/research-style)

- demonstrate your ability to execute a project with a variety of needs (different audiences, uses, etc.)
- demonstrate that the project was developed with scalability in mind

If you have experience migrating a static site to Drupal and/or developing a mobile presence, please include details of those projects.

9. Project pricing

The budget allocated for this project is \$25,000 - \$30,000.

Pricing should include bid for the entire project, pricing breakouts and whether any of the work will be sub-contracted. We will expect several design iterations as we progress through the redesign process.

LAUC will not pay for any costs incurred in preparation of a proposal in response to this RFP. All offerors must provide a price guarantee that the proposal estimate remains valid for 90 days.

10. Timeframe

We began the analysis and review phase of this project in November 2013 and expect the remainder of the project to include the following phases: design, development, testing and migration. Our goal is to have the project completed by December 2014.

We hope that design and development can start at the beginning of August and be completed by the beginning of September.

Proposal send date: June 30

Proposal due date: July 11

Vendor selection date: July 21

Project initiation: August 1

Project wrap-up and delivery date: December 1

11. Contact Information

Please direct responses to this proposal and/or any questions via email to:

Julie Lefevre, LAUC Web Manager / UC Berkeley
jlefevre@library.berkeley.edu

Proposals will be accepted until 5 p.m. PDT, July 11, 2014.

LAUC web redesign vendor evaluation matrix				
x= yes, o=no	Five Paths	Giant Rabbit	Project6	notes - GR
Functional parameters				
Drupal content management system	x	x		
Responsive design	x	x		
Embedded media	x	x		
Social media integration	x	x		
Online application functionality	x	x		
Event registration forms	x	x		
Document management functionality	x	x		
Calendaring system	x	x		
LAUC member directory	x	x		
Site search	x	x		
Proposal directions				
Information on company's location, history, size, specialty, and design philosophy	x	x		
Outline of typical process of designing a website from start to finish	x	x		
Estimate of how long it will take to complete project	x	x		
Provide name/contact info of three references	x	o		
<i>Did the referrals recommend the vendor? Any major issues?</i>				
Cost estimate within budget range?	x	x		concerns about pricing process
Portfolio of related projects? (similar scope, content, user needs?)	x	x		
Experience migrating a static site to Drupal?	x	o		
Explanation of cost	x	x		
General				
Demonstrated competence and professional qualifications necessary for successfully performing the work	x	x		
Recent experience with website redesigns for academic/non-profits	x	x		
Background and experience of individuals assigned to project.	x	o		
Experience in making a website interactive, user-friendly, informative, and attractive	x	x		
Experience in content management website construction	x	x		
Understanding of the work required, completeness of responses to specific requirements	x	x		understanding ok; not very complete
Creativity in website development, extent to which the proposal reflects objectives	x	o		our objectives not reflected
Proposed approach in completing the work	x	x		
Does the cost include post-implementation support?	x			can be arranged @ hourly rate
Does the cost include training?	x	x		10 hrs
Does the cost include documentation?	o	o		

Librarians Association of the University of California, UC Berkeley

FivePaths LLC

July 10, 2014

Website Development Project

Provided by Eric Leland

Contents

Summary	2
Project Overview	2
Website Details	5
Project Phases	6
Support	8
Compensation and Timeline	9
References	9
About FivePaths	11
FivePaths Project Team	12
Conclusion	14



Summary

FivePaths will provide Website Development and Design services to the the Librarians Association of the University of California (LAUC).

We use focused collaboration and quick cycles of development to produce a high quality, custom designed website rapidly within a fixed budget. Focusing time and effort in close collaboration removes costly communications cycles and project delays, while ensuring each contributor remains fully focused on the project. For success, this process requires your active participation.

Project Overview

FivePaths will work with LAUC implement a new design and website features for <http://lauc.ucop.edu>. We recommend LAUC use a modern Content Management System (CMS) to support the refreshed design and features required.

We recommend that LAUC consider online tools that are both highly effective in reaching online audiences, requiring simple interfaces for LAUC administrators to manage the content. We recommend supporting many feature requests with common tools to reduce complexity while enhancing online communication. This strategy will serve to best promote LAUC broad and deep content, while maintaining a site sustainable with fewer administrators and less cost to LAUC.

Based on LAUC's features requested in the RFP, we recommend the following areas for focus.

Drupal 7 Content Management System

Drupal 7 CMS (drupal.org) supports easy content management by non-technical website users, is well supported among UC campuses, does not require licensing fees, supports highly scalable and responsive websites, and is the one of the most popular website systems on the market today.

Responsive Theme Framework

LAUC requires a updated look and feel to the site that is accessible by a variety of devices common to website users today, including desktops, laptops, tablets, phones and other mobile devices. We recommend adopting a grid theme framework that enables the same theme code to react appropriately to various screen sizes available today, giving LAUC one simple and compelling design that looks great everywhere.

Document Management

LAUC has a number of documents, including PDFs, DOCs and others that require a more attractive presentation and easier way for visitors to find them. We will work with LAUC to develop categories and other attributes as needed to help organize these files in groups that are appealing to website visitors. We will build easy-to-use tools to help LAUC website managers quickly find, edit and add new files. We will design visually compelling presentations of the document “teaser” details and build tools to allow visitors to easily filter and find documents they are seeking.

Media Management

LAUC is interested to bring more imagery and other visuals to the website. FivePaths recommends building tools that simplifies the management of visual and video content, enabling site administrators to quickly and easily post content while preserving strong visual presentation. We will provide automatic image resizing, caching, and basic design manipulation to enable uploaded imagery to best fit in the available space on the web, and to best match the design of the site for greatest impact. We will provide a simple to use YouTube integration allowing rapid posting of videos for viewing directly on the site. This will allow LAUC to leverage the huge offsite YouTube community, attracting larger audiences to learn more and take action.

Event Registration and Event Calendar

LAUC would like to promote free events, many of which are smaller and require no registration, but a few larger events that do. We recommend developing a web form strategy, using Drupal CMS Webform, that allows event registrants to fill out registration details online, and includes the options for the LAUC event coordinator to be notified of registrations and to view/export a list of registrants. We also recommend that all events be displayed in a rolling list calendar view that provides the key details for each event, and allows interested visitors to click through to see the full details of the events. We anticipate that some events may need only basic description information, while others may need more content and imagery - we will provide a flexible template to allow LAUC to include lengthy or short content in a compelling way.

People Pages

LAUC would like to provide a searchable directory of people engaged in LAUC work, such as committees, members, staff, etc. We will provide specialized people pages that allow for a headshot image, biographical and contact details. We will provide a category system for LAUC to define what group each person belongs to, and a system for visitors to find people based on these category, by name search and other criteria as needed. We will work with LAUC do determine whether certain groups of people will need specialized information, or displays, to ensure each group gets listed in the best way possible online.

Hosting

LAUC is interested to get the best recommendation for hosting. We have long running experience several industry leading hosting solutions, and are experienced in using specific systems common with UC campuses, including Pantheon and ServInt, as well as more localized UC services such as UC Berkeley IST and the UC Office of the President. We will learn the specific hosting needs for LAUC and recommend the the best fit solution.

Improved Analytics, SEO, Accessibility

LAUC is interested in reaching a wider audience with the new website. We will implement Google Analytics system on every page of the new site, ensuring that traffic to these pages can be measured in great detail. We will also implement key SEO (search engine optimization) tools to ensure LAUC webpages are more easily found by search engine users - including description and keyword fields, and effective use of heading tags to help LAUC rank higher in search engines. We will implement specific and necessary accessibility tools to help website visitors of various abilities to use the site.

Social Media

LAUC is interested to integrate social media sites used. We recommend that communities with lots of activity are streamed directly to the site in a sidebar block, and less active communities are promoted as links in the header, sidebar or footer of every page. We will work with LAUC to learn what the social media goals and sites are, and recommend a solution. We will then integrate these systems into the site.

Content Migration

LAUC is interested in solutions that help minimize manual work in moving content from the old site to the new site. We will audit the current website to discover the variety of pages and files available. LAUC does have hundreds of file uploads, many of which need to be moved over to the new website. We will audit these, and develop a tool to help automate moving these files to the new website. We will also look at other pages of the website to determine if it is possible to help automatically migrate more content. If it is, we will propose a solution and work with LAUC to implement.

Blog Integration

In evaluating the website, we found that LAUC maintains a blog using Blogger at <http://laucassembly.blogspot.com/>. We recommend discussing ways to integrate the blog into the LAUC site more. If it is important to have a separate blog (for example, to keep the opinions separate from the official LAUC message), it might be ideal to feed in the conversation from the blog to the new website, so that folks visiting the website can see the related conversation right away and go visit the

blog. If keeping the blog separate is not a requirement, we recommend we build specialized blog content in the new website, to give LAUC one system to manage, and to more tightly integrate this content with the rest of the site.

Enewsletter System

We recommend LAUC consider implementing a newsletter system. LAUC hopes to attract more visibility and engagement with resources offered and events. An integrated enewsletter system would allow visitors to subscribe (and unsubscribe themselves) using only their email address, and LAUC to develop simple, regular email blasts highlighting upcoming events and new/updated documents. We would integrate a leading and cost effective enewsletter system such as MailChimp or Constant Contact.

Website Details

The Client will receive a website with the following features:

1. Updated Drupal 7 CMS.
2. Theme framework responsive to multiple screen sizes (i.e. desktop and mobile devices).
3. Custom design to render our responsive theme framework using best fit imagery, colors and styles.
4. Content “types” that support the page varieties required.
5. WYSIWYG editor to support HTML content management.
6. Revision tool to save past copies of pages, and allowing editors to restore past pages in case of error.
7. Slideshow/tiled interactive for the home page to combine strong imagery and text with hyperlinks to promote content within the site.
8. Image management system for including images on pages.
9. File uploading system for attached documents.
10. Structured image regions allowing the inclusion of a main image on pages following consistent size and placement rules.
11. Administrative tools allowing approved editors to find and manage content directly through the website.
12. Graphical tools for managing menus and navigation.
13. Analytics tool for comprehensive visitor tracking and analysis.
14. Implement social media support such as Facebook, Twitter, LinkedIn.
15. Hosting recommendation, and site deployment on new host.
16. URL aliasing tools allowing editors to redirect old/deleted web pages to current web pages.
17. Domain DNS support to properly launch the website to the public.

18. Training / resources covering necessary content management to support editors.
19. Recommendations for additional development and support services post launch.

LAUC Project Specific Features

20. Custom content types for specialized content, including events/calendar, people, resources/ documents, programs and blog content.
21. Sitewide search tool, as well as specific filters for drilling down into deeper content areas such as people, events and resources.
22. Migration services, targeted at automating the migration of files to the new site. Also migration recommendations for other content that may help LAUC save time.
23. User management tools for LAUC to create new site users, and to assign them to properly configured roles that give each user the permissions they need to edit the website.
24. Integrated newsletter service such as MailChimp, Constant Contact or Vertical Response.

Project Phases

We recommend a phased approach to developing the website that focuses on the most critical needs first. These phases include:

Phase I: Strategy & System Architecture

This phase focuses on planning and priority setting, and developing an improved site map and wireframe content layout for the rebuilt website. We gather more details of your requirements from the RFP, including key goals, and exploring together your audience, the competition you wish to emulate (and avoid), design and feature requirements, information to track and report, and measures of success. Using this information, we look at your current systems and integrations to understand both the gaps and opportunities revealed to meet your goals.

The system architecture is the most important phase of the website build process. We build comprehensive picture of what information the site will contain, how it is interrelated, and how this content will be presented to visitors. Focusing our work here helps us eliminate costly surprises later in development, making sure we stay on target. The result of our system architecture work is called the `site map`.

The site map is an overview of both the content within the entire site, the main navigational organization and/or themes, and the relative priorities for each of these items. The site map will guide the organizing of content to best express the goals of the website and to facilitate a user's efficient interaction with the website.

Phase II: Wireframes

The site map then evolves to a wireframe document that provides a skeleton sketch of the critical page types we will build, including the home page, specialized landing pages, content widgets, and more. Wireframes help us envision how the pages across the site will organize content, allowing us to make easy changes to this logic before we begin designing and building the site. Wireframes are a great vehicle to communicate with LAUC and our design team the parameters for development.

Phase III: Site Design

This phase combines the design discovery work during Strategy & System Architecture and Wireframes, to produce a refreshed visual layout to the website.

We work together with LAUC's team to determine the new design needs for the site. Working with your existing logos, we will look for opportunities to achieve greater effect with simple, powerful presentations. We also look for design ideas that may lead in a costly direction, and surface alternatives for the team to consider.

We will provide 3 rounds of visual mockups to generate final decisions on design, and to move to the next phase. The mockups will contain representative pages of the site that showcase unique design elements, so we are sure to cover all elements required.

Phase IV: CMS Development

This phase works to develop the Drupal 7 CMS features requires. This is the largest area of our work together with LAUC.

Our approach is to fully build the website system, and replace the existing sites with this new system - rather than "upgrading" the current websites. This will ensure that each state website is produced on a common platform, without inheriting unique and possibly conflicting code elements.

We begin by building a stock Drupal 7 website, and deploying the necessary modules to support all of the features described in earlier phases. We develop the content types, menu and tagging systems, views and widgets required to organize and display content properly. We also develop the site templates using the final deliverables from our design team.

We work to tackle the most complex features first, to surface challenges as early as possible in the project. This would include the files on the site, events, resources, people pages.

We do all of our development on a development (dev server) environment we provide, and give complete access to the LAUC team to review on a continual basis. Our development cycles include regular review of key features as they are developed, allowing for a feedback and refinement period to ensure the development stays on target.

Phase V: Data Migration

This phase recommends and develops a migration approach to moving content from the existing websites to the new systems.

Content work is often the most time consuming part of web development. Working with your content audit, we will provide recommendations for how best your team can move content from the current site to the dev site.

FivePaths will automate the import of the Local Projects Database, and rely on LAUC to scan and make any minor adjustments manually as needed.

Phase VI: CMS Training, Testing & Refinement

After completing the website on the development site, we enter a testing and refinement stage. LAUC reviews the website and provides feedback on any bugs, enhancements or questions that have occurred that we need to focus on before we launch the site. For those items we determine together to be necessary to handle before the launch, we refine the website to accommodate them, or provide scope and timeline information to LAUC to provide a plan for how to implement them.

We will provide on-site training to content managers on how to manage all content on the website. We are available to provide additional and ongoing trainings in support as needed.

Phase VII: Launch

After addressing each item in the feedback, we focus on site launching activities. If necessary we can work with your technical support and vendors to get access to your domain name, and prepare the necessary settings changes to launch the site. We will determine the optimal web server scenario, and move the development site to the proper location. We test to ensure proper functioning. We work with LAUC to plan an appropriate launch date, then help with the launch the website. We then closely monitor the site for the first 7-10 days closely to ensure proper and expected function.

Support

FivePaths is excited to maintain long lasting partnerships with all clients and will work with LAUC to determine the best fit support engagement. We provide ongoing Drupal CMS support, including critical module updates, periodic full system upgrades, system backup and performance tuning. We provide custom ongoing support packages, giving LAUC guaranteed consulting support on both strategic and implementation levels. We also provide customized trainings for your team to help keep your skills and knowledge of technology applications for LAUC at their very best.

Compensation and Timeline

FivePaths is pleased to offer competitive pricing for all nonprofit and university projects:

Total Cost: \$28,000 | Estimated Timeline: 8-10 weeks

This includes everything listed in 1-24 under Website Features and Project Specific Features above.

Milestone	Budget
Phase I: Strategy & System Architecture	\$1,000
Phase II: Wireframes	\$2,000
Phase III: Site Design	\$4,000
Phase IV: CMS Development	\$14,000
Phase V: Data Migration	\$3,000
Phase VI: CMS Training, Testing & Refinement	\$3,000
Phase VII: Launch	\$1,000
TOTAL:	\$28,000

Support (optional): \$1500 per month

A monthly service providing critical maintenance, security updates, backups and support for Client requests - including troubleshooting, training, design, new features and strategic consulting. For larger projects that fall out scope for support, we are happy to provide a separate scope of work for these.

Extra costs may include domain registration, photo/software licensing, third party software the client chooses (such as survey and emarketing widgets), and hosting as required. Approval from the client for each extra cost is required.

References

Asian Americans/Pacific Islanders in Philanthropy

Lori Kodama, Senior Director | Email: lori@aapip.org | Tel: (415) 273-2760 | www.aapip.org

AAPIP is one of our longer term clients. We provided strategic technology visioning, then implemented a new Salesforce CRM and Drupal CMS system & mobile responsive design. The site includes resources, events, related content, strong imagery, people sections, filters, analytics, member signup

and more. We are providing ongoing technology strategy, support and training and projects implementation. We work directly with several folks at AAPIP, most recently we have been working with Cynthia to support her development team refine Salesforce, and to implement a basic member payment solution on the website.

The Philanthropic Initiative

Maureen O'Brien, Marketing Manager | Email: mobrien@tpi.org | Tel: 617.338.2590

The Philanthropy Institute provides consulting services to foundations and philanthropists who are developing giving programs. They needed a main website to share their programs, services, resources, team and blog at www.tpi.org, as well as a donor education toolkit (DEN) that walks philanthropists through key strategic advice and provides referral resources (in final development).

The sites needed to be very easy to use, attractive and mobile responsive, and allow for growth as the team decides to add more content and content sections to the website.

U.S Department of Labor YouthBuild Program

Mary Duffy, Mary Duffy & Associates Tel: 650/728-1033 | mduffy@technoqueens.org

YouthBuild helps low-income young people ages 16-24 work toward their GEDs or high school diplomas, learn job skills and serve their communities by building affordable housing, and transform their own lives and roles in society.

FivePaths works with The U.S. Department of Labor together with YouthBuild USA to produce and support an online resource for sustainable construction practices. We have been both lucky and challenged by the vast and deep resources available through the Department of Labor - we worked closely with many stakeholders on communications and project management strategies to keep the project both efficient and enjoyable.

Our team included content developers, project managers, instructional designers, web design and development experts working on all aspects of the project, from strategic planning through development and implementation.

FivePaths has continued to work with the U.S. Department of Labor on a variety of website and strategic projects, including website accessibility, constituent and commerce management, online knowledge bank consulting, vendor evaluation services and more.

Institute of Governmental Studies, UC Berkeley

Julie Lefevre | Tel: 510-643-6445 | jlefevre@library.berkeley.edu

Working with the team at LAUC, FivePaths developed new website to house a large array of documents and specialty pages, including legislative pages, resources, people pages, events and more. We developed templates that are flexible to allow pages to be either simple with short information, or expanded to provide more detail, without forcing the user to dive ever deeper into the site.

We provided multiple rounds of wireframe and design review, and helped the team consider various options for presenting key information the best way possible on the website. It was important for various stakeholders to have time and space to consider different options - we made sure to give the project the time and attention necessary to develop these ideas and center on the best solutions.

We developed a strategy for migrating large amounts of content to the site, that helped to reduce the time staff spent copying/pasting content, and reduced the number of errors inherent in manual content migration work. We provided training, and ad hoc support when needed

Additional Projects

FivePaths' specialty is working with high content websites, to create attractive, professional and easy to use systems for both visitors and site managers. Additional project case studies can be found online at: <http://fivepaths.com/projects/education>.

Other UC projects we have worked on include:

- Institute of International Studies at UC Berkeley
- Laird Lab at UCSF
- Ethnic Studies Library at UC Berkeley
- Academic Programs at UC Berkeley
- CalSWEC
- Science and Health Education Partnership at UCSF

About FivePaths

FivePaths (www.fivepaths.com) is a company formed in 2008, with locations in San Francisco, Marin County and Chico CA. Both co-founders Eric Leland and Jason Salter have many years of experience planning and implementing a wide variety of technology systems. We are unique among our competitors in the breadth and depth of technology challenges we can handle, especially for nonprofits, coming from our years of experience reviewing and architecting solutions integrating a variety of technology tools.

We are a small company, and intend to remain this way. We keep very low overhead, maintain a controlled number of clients, and as a result maintain very strong client relationships. We do not have plans to leverage investment funding, and have been quite successful without this assistance in good and bad economies.

FivePaths is a partnership between long time web developers and data architects with over 15 years experience on a wide variety of nonprofit and for-profit applications. We have worked both inside nonprofits, universities and businesses as staff and managers, as well as outside as consultants, giving us a well-rounded view of the challenges and opportunities presented with a wide variety of business models.

Our work focuses approximately 80% on website content management and data integration projects. 20% of our work focuses on strategy and education, particularly information management planning, vendor selection, software research, emerging technologies reviews and multiple online webinar and in-person conference workshops. Our team has one awards for outstanding service, including from the National Technology Enterprise Network and Young Nonprofit Professionals Network.

Key Contact Person

- Eric Leland, Partner, FivePaths
- 234 W. Third Street, Suite A
- Chico CA 95928
- 510/375-2396 | eric@fivepaths.com
- Tax ID: 26-3430631
- Online Portfolio at: <http://www.fivepaths.com>

FivePaths Project Team

Our team provides the creative thinking required to interpret requirements and provide best-fit solutions that reduce complexity, saving everyone involved time and cost. The development team will consist of a technology lead, (responsible for project management, quality control, systems integration issues and overall site strategy), a CMS developer and a custom programmer / design specialist.

We are excited to have the following strong team available to work on this project:



Technology Consultant and Project Manager: Eric Leland, Partner

Eric Leland has spent the last 15 years working with progressive organizations and businesses tackling online and offline technology challenges both on staff and as a business leader. As a founding partner of FivePaths (fivepaths.com), Eric focuses on strategic technology planning, website and database planning and development. Eric served as the Director of TechCommons at TechSoup.org, one of the nation's most comprehensive nonprofit technology assistance organizations. Eric managed nine technology experts, and provided strategic guidance and implementation services for numerous transaction based systems including donor management systems, nonprofit storefront and large scale software donation distribution systems.

Eric is very active in nonprofit and technology circles. He serves as a member and a past co-chair to the Young Nonprofit Professionals Network in San Francisco (ynpn.org), and as a member of the Graphic Alliance (graphicalliance.org), the Tech Underground (techunderground.org) and the Nonprofit Technology Enterprise Network (nten.org). Eric is a regular contributor to local and national nonprofit technology resources, including the National Technology Conference (nten.org/ntc), Idealware (idealware.org) and Craigslist Foundation (craigslistfoundation.org).

Development Lead: Jason Salter, Partner

Jason Salter wrote his first computer program in 6th grade, designed and built a computer before finishing high school, and then went to MIT to become a molecular biologist. Considering the parallels of DNA as "programming code" and recombinant DNA technology as the means to reprogram organisms Jason's interest in computers led him to get a Ph.D. in Biomedical Sciences from UCSF focusing on Tropical Disease Medicine.

Jason's interest in "programming" has since taken him into website systems development. The rise of content management system (CMS) technology has created an exciting opportunity for everyone to participate in "programming" their websites. Jason established his consultancy (JasonSalter.com) and is a founding partner of FivePaths, having become an expert in developing CMS technology using the latest open source technologies for solving a wide variety of client needs. In addition to mastering state-of-the-art web development techniques Jason keeps his focus on "the big picture" and is responsible for solving complex integrations, web services, and information architecture problems.

Architecture and Development Support: Francisco Cortez

Pixel perfect design innovation is just one of Francisco's many talents. With wide ranging design expertise, Francisco develops print, web, and interactive designs following both traditional and experimental methods. As an information architect, Francisco extracts order and simplicity from rich text and multimedia content to produce fluid, friendly website navigation and taxonomies.

Formerly as a small business owner with Cortez Design and now a member of the FivePaths team, Francisco's commitment to community shows through his work with small businesses, education groups, anti-poverty organizations and more.

Subcontractors

We do not plan to employ subcontractors for this project.

FivePaths sometimes employs subcontractors for portions of website projects. We commonly work with colleagues from the Tech Underground (techunderground.org) and Sarai, LLC (sarai.org) on technology infrastructure issues. We work with our colleagues and members of the National Technology Enterprise Network (nten.org) and experts associated with Aspiration (aspiration.org) on a variety of data and network related issues. Additionally, we often work with web hosting companies who provide very cost effective and enterprise level services, a few of whom include Pair Networks (pair.com), ServInt (servint.com) and Electric Embers (electricembers.org).

Conclusion

We are excited to help launch the site!

Thank you for the opportunity to discuss this project with you. Please let us know if you have any questions about this proposal – we are happy to answer any questions.

We look forward to working you.



Eric Leland
Partner



Jason Salter
Partner

