

Worldwide Plone Conference Seattle, WA October 2006



100 Hours or Less: Creating a Scope of Work for a Simple Plone Website





- Introductions and Expectations
- Elements of a Scope of Work
- Scoping a Plone Website
- Website Building Roles
- Converting an Existing Website to Plone
- Getting the Customer Ready (if we have time!)





What this workshop is NOT:

A how to for coding a Plone website!

What this workshop IS:

A hands on 90 minutes that will teach you how to create an effective scope of work

Tips and tricks for if and when to "convert" to Plone

Notes about the different roles needed for an effective Plone implementation.





NPower Seattle's mission is to help Puget Sound nonprofits use technology to better serve their communities. (www.npowerseattle.org)
We adopted Plone about 18 months ago
We have approximately 25 sites under our belt
My role is to get customers ready, make sure we have a strong scope of work, and manage projects as needed!





What is a scope of work?

A scope is a formal document, usually signed by both parties that indicates what will happen, when it will happen, how much it will cost, and what will be delivered.





- Background about the customer
- A description of the **engagement**
- Expected Outcomes
- Deliverables
- Consulting hours and cost
- Risks and Considerations
- Schedule, Work Plan and Deadlines
- Hold Harmless Clause
- Signature Block





Why is this important?

You need to be able to tell the customer, in your own words, who they are and what they do. This is both a selling tool and a practical one – if you don't know this – it will be hard to implement an effective website!





The **Seattle Biotech Legacy Foundation** (SBLT) was founded in 2001 when Amgen acquired Immunex. Immunex employees had a strong culture of giving to the local community and wanted to create a nonprofit that would continue that work. Over time, SBLF has evolved and matured and re-wrote their mission statement last year: "The Seattle Biotech Legacy Foundation works toward a healthy, sustainable future by promoting science-based understanding, solutions and actions that are grounded in recognition of the interconnected nature of our world."





- St. Joe's Baby Corner (SJBC) was founded 20 years ago, and provides clothing, diapers, car seats, food and other services for infants and toddlers. SJBC does this by soliciting, purchasing or otherwise acquiring these items and then making them available to nurses and other public health care workers who then distribute them to those in need. Although they are able to respond to only a fraction of the need, SJBC is meeting a critical need, especially to low income families. SJBC provides services to approximately 2,500 babies a year.
- SJBC is growing, and now has a staff that includes their Executive Director (and founder of SJBC) and a part time administrative staff. They recognize the need to provide a compelling and easy to update web presence, and an SJBC volunteer met with Leandra Darcy and Patrick Shaw to discuss how NPower Seattle may assist SJBC with their website needs.





This describes **what** you are going to do and **why**. Not how you are going to do it, mind you (although some of the how might creep in) but what and why. It may contain legacy information such as "customer x was unable to update their own website and phoned NPower Seattle to ask for help."





This should describe what is DIFFERENT:

Customer will have a new Plone website Customer will be able to easily update content Customer will know how to manage users Website will integrate with Active Directory, SalesForce, and Great Plains for a single sign on solution.





- NPower is recommending that SJBC use Plone for their web platform, and ?? as their hosting server.
- NPower will provide training to Barbara and up to three other SJBC core staff members/volunteers on using the Plone platform to update and maintain their website.
- SJBC has created a site map and a visual design that NPower will implement.
- The site will have two levels of navigation with approximately 11 areas.
 - Main site home page
 - Main site branch
- There will be two levels of users for the website: the public, and SJBC staff. Staff will be able to edit all aspects of the site. The public will be able to view and download, but not edit, any portions of the site.





- NPower is recommending that SBLF use Plone for their web platform.
- NPower will provide training to key SBLF staff on using the Plone platform to update and maintain their website.
- NPower will use all of the existing design elements from the current SBLF site (<u>http://www.sblfoundation.org/</u>)





What you will give the customer: Planning Visual Design Information Architecture Coding and implementation Publishing **Training and Documentation** Content???





This can be a simple fixed fee or a more detailed time and materials section.

Reconsider padding your scope! Consider an overage clause! Consider revealing your profit as a line item! Mention your change of scope process!





Planning 6 hours Visual Design 15 hours Information Architecture 5 hours Coding and implementation 40 hours Content Build out Publishing and Testing 7 hours Training and Documentation 6 hours TOTAL Hours and Costs 79 hours / \$6,715.





Make sure to include:

How long the scope is valid

- When you will start after receiving a fully executed copy
- Any constraints or slippage that may happen for you or for the customer
- Consider padding your schedule if you can!





8-21 to 8-24

Planning & Production

8-4 to 8-18

Publish and Test

• Approx. 2 week duration • Customer tasks include approving design and approximatly4 hours

• Approx. 1 week duration • Customer work effort estimate includes 4 hours of testing and providing test notes

Training

Approx. 1 week duration
Customer work effort includes 4 hours of training

Launch Site / Training

8-25

Approx. 1 day
Customer will provide login information for modifying DNS records prior to launch. Training will be held the week of August 28th for up to 4 users





Include a risk statement about the project – try to reveal what might go wrong:

"There is a risk that the costs associated will be greater than the budgeted amount."





If the existing graphics are not available, NPower will have to create them, increasing the scope of work. Customer has a graphics folder on their existing site called "Source Graphics" that NPower will use for reimplementing design elements.

Some website text on the existing site consists of graphical content. Graphics tend to look better than text. Implementing graphics instead of text may better match the existing site, but would also increase the scope of work, and would reduce the flexibility of the tool.





What can you include here that will make your life easier later?

Access to DNS Access to existing graphics A web-hosting agreement! Standard Plone Features





Plone has a LOT of built in features – and each customer may want some, none, or all. Here's a quick list of some items that you may exclude or include using a strong scope of work.



Sample Customer Choices

At several junctions during the design and implementation phase, SJBC will be required to make choices about Plone standard and extended features, and roles and permissions for SJBC staff who will be using the site. The list that follows highlights some of these areas:

Approve design implementation

- Include or exclude Plone features such as:
 - Live Search
 - Print This Page
 - Email This Page
 - Automatic additions to navigation

Create a list of initial website editors and users, to include:

- First and Last Name
- Email address

Provide access to Dynamic Name Server (DNS) so NPower can launch the website by pointing the SJBC DNS to the new site.

Select pictures for website and provide them to NPower Seattle in digital (JPG) format.





Check with your legal team about this – but it is common to have a hold harmless agreement.

And you'll want to have the right person on your team and on theirs to sign!





The agency/customer agrees to indemnify, defend, and hold NPower Seattle and its subsidiaries and affiliates, and their successors, officers, directors and employees, harmless from any and all actions, causes of action, claims, demands, costs, liabilities, expenses, and damages asserted against any of them arising out of or in connection with any work performed while under this agreement.





for Seattle Plone Users Group

for NPower Seattle

Name: Andrew B and Brian G.	Name
Tunic. Thidrew D und Difun G.	
Signature	Signature
	71' 4
Title: Director of Consulting	Title
Date	Date





Imagine an existing customer or a potential one. Take 5 minutes and craft a brief description that you would include in a scope of work.

If you're here with a team or a partner – work together! If you're not – now's your chance to network!





Use the Background and Engagement Description you just wrote –I'll provide a site map, and some design elements. Your job? How many hours would it take to code, publish, test, document and train for this website?





About Us Mission Directors Advisory Board Offerings Conferences Events MEC Library News Events Calendar

(Home, search, contact, Login, other footer and header information) Tip – this is really a TWO template design – a Home Page (sometimes we call this a splash page) which reveals the 2nd level nav, and a 2nd level nav. Any other content will be pages not represented in the nav.





PROFESSIONAL DEVELOPMENT



MEC LIBRARIES

Our Vision & Mission MEC provides educational communities with support to accomplish the goal of improved math instruction for all.



CALENDAR OF EVENTS

Have any feedback or suggestions for this site? We'd love to hear from you. Development of this website was supported, in part, by the National Science Foundation. Opinions expressed are those of the authors and not necessarily those of NSF. Copyright © 2006 Mathematics Education Collaborative



MEC

ABOUT MEC



COURSE I: PATTERNS. FUNCTIONS, & ALGEBRAIC THINKING

COURSE II: GEOMETRY & PROPORTIONAL REASONING COURSE III: PROBABILITY & DATA ANALYSIS

COURSE IV: NUMERICAL REASONING

CONFERENCES



This course is a pre-requisite for all other MEC courses. It is designed to model a learning environment that meets the needs of all students, helping them become successful problem solvers who are able to use mathematics as a powerful tool for making sense of situations and information in the

real world. Participants will work collaboratively and independently on tasks that embed mathematical ideas in a variety of contexts. The course models both the kinds of assessment practices that result in improved student performance and a learning environment consistent with what is known about the human brain and human learning.

In addition to a focus on algebraic reasoning and the inter-relateness of algebra and geometry, course time is spent developing participants' numerical reasoning skills. The specific mathematics

Grade 5 Teacher

Portland, OR

This was the best math class I have ever taken. It was difficult and challenging, yet I was able to see why an algebraic function worked. I have never learned so much in 9 days. I am exhausted from thinking math for 6 hours a day, then homework, and also dreaming math. I am so excited about my learning as a student which will help me teach my fifth graders better. I wish parents, spouses, colleagues, and college students had to take this course. It is so powerful!!

Read more testamonials >>







- OUR MISSION
- BOARD OF DIRECTORS
- NSF ADVISORY BOARD
- STAFF

Our Mission

DIRECTORS

The Mathematics Education Collaborative provides educational communities with support to accomplish the goal of improved mathematics instruction for all. For more information, view our Mission Statement. You also can meet our Board of Directors, NSF Advisory Board, and Staff.

Meet Our New Advisory Board Member

Placeholder text information, view Placeholder text our Mission place Statement. You also can meet our Board of Directors, NSF Advisory Board, and Stuff.

Read Patty's full bio >>

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Since the design and site architecture are done already – you just need to provide:

- 1. Hours for implementing
- 2. Hours for publishing
- 3. Hours for training and documentation

Take 10-15 minutes to guestimate how many hours this would take.





Let's brainstorm a list of different roles or functions needed for creating a Plone website from scratch!





- Information Architecture
- Website Strategy
- Visual Design
- Coding
- Testing
- Training and Documentation




Our Designer:

- Information architecture
- Visual Design
- Website strategy (sometimes!)





Our Coder:

- Prep site on dev server
- Code site (CSS) and other functions
- Test
- Publish





Training and Documentation

Someone (sometimes the coder, sometimes the designer, sometimes me!)

- Hands on training
- Documentation





Content, content, content . . .

If you aren't ready to help customers start thinking about branding, content, telling their story, segmenting their audience – then you should consider strategic alliances with people who have these skills!





- Site Map
- Visual Design
- Notes











- Not to use anti-aliasing!
- Fixed vs. fluid design
- Justified or centered?
- What Plone creates on the fly (sub-menus)
- About Events and News Items
- Tension between design and access to content
- SIFR! Rich Accessible Typography for the Masses (<u>http://www.mikeindustries.com/sifr/</u>)





- Not using much workflow!
 - Clients are initially excited about it, but then it proves too complex and cumbersome







• Owners retract, reviewers reject





Simple and trusting



• Review portal content given out freely





NPower started with some conversion sites – we figured that would be easier that figuring out Plone and creating a design and so on.

There are challenges associated with each. Let's brainstorm a list of possible challenges with converting an old site.





First words to a customer wanting a strict conversion . . .

Do you know about the Dreamweaver / Contribute combination?

Do you know about Nvu?

(<u>http://www.nvu.com/index.php</u>)

Have you heard of Microsoft Front Page?

We teach a really great class at NPower Seattle called "HTML Basics"





- Scope Creep
- Can you just fix that?
- Graphics masquerading as text
- Frames!
- No access to original graphics
- I liked the old calendar better
- I didn't want that print thingie on every page





The KGF Foundation had a compelling reason to convert – an old Cold Fusion site that also served as their annual report – if they could get their Access Database to populate the data every quarter. They could pay for hand coding for 2 years – or they could pay us to convert, so we did. Let's scope!











Who We Are

About the Foundation

A Message from our Founders



The Kongsgaard-Goldman Foundation is a small, private foundation formed in 1988. The Foundation provides support to a wide range of nonprofit organizations in the Pacific Northwest (Washington, Oregon, Idaho, Alaska, Montana and British Columbia, Canada).

KONGSGAARD GOLDMAN

Within the program areas of human rights, civic development, environmental protection and restoration, and the arts and humanities, the Foundation favors projects reflecting a deep and broad level of citizen participation and leadership. Our priority is to help fund the building of grassroots organizations with the power to change their communities and improve their lives.

In celebrating our 15th year of grantmaking, the Kongsgaard-Goldman Foundation is pleased to announce our updated website and latest <u>grants list</u> for year 2003. This year brought a new focus for the foundation, a paper-less reporting of our latest grants. We have shifted from a thirty-page printed Annual Report to our newly designed grants list, featured here on the website. We are also

Who We Are Program Areas Application Process Portfolio of Grants Resources

NPswer



Portfolio of Grants



2003 Grants

2002 Grants

2001 Grants

2000 Grants

1999 Grants

1998 Grants

1997 Grants

1996 Grants



In lieu of a printed Annual Grant report, the Kongsgaard-Goldman Foundation publishes grant information here on our website. To view grant information, select a year (at left), then select a Funding Area from the submenu that appears. To view information on a particular grantee, click on their name in the list.

 \square





Grants	KONGSGAARD GOLD	MAR	tion
opment	2003 Grants Arts & Humanities		A Contemporary Theatre Kreielsheimer Place, 700 Union Street
	<u>A Contemporary Theatre</u> \$10,000.00		Seattle WA Phone: (206) 292-7660 Fax: (206) 292-7670 Zip: 98101-4027 Web: <u>www.acttheatre.org</u>
	<u>Arts Corps</u> \$5,000.00		Mission Statement Presenting a broad spectrum of the very best of
	<u>ArtsWest</u> \$10,000.00		contemporary theatre that speaks to audiences of all backgrounds through a combination of great story-
	<u>Cascadia Methow Music Association</u> \$3,000.00		telling, exciting artists and intimate settings.
1	<u>Chamber Music In Napa Valley</u>	~	Grant History:





Create a scope of work for converting <u>http://kongsgaard-goldman.org</u> to Plone.

Include 4-8 high level tasks, how many hours you need, and a list of questions you might have for the customer.

Assume that you will NOT be changing the design in any way, or the architecture.





Making a perfect design match is tough!

- We might not like frames, but change is hard for some folks.
- If we don't control the DNS, an agency might have TWO sites available to the public – the HTTP and the WWW!











Portfolio of Grants KONGSGAARD GOLDMA

2005 Grants	Portfolio of Grants
2004 Grants	In lieu of a printed Annual Grant rep the Kongsgaard-Goldman Foundatio
2003 Grants	publishes grant information here on website. To view grant information,
2002 Grants	select a year (at left), then select . Funding Area from the submenu tha
2001 Grants	appears. To view information on a particular grantee, click on their nar
2000 Grants	in the list.
1999 Grants	
1998 Grants	
1997 Grants	
1996 Grants	





Portfolio of Grants

KONGSGAARD GOLDMAN

2005 Grants Arts & Humanities Environment Human Rights & Civic Development	2005 Grants Arts & Humanities	Arts Corps 5609 Rainier Ave Ste B Seattle, WA 98118 Phone: (206) 722-5440
2004 Grants	Arts Corps \$5,000	Grant History:
2003 Grants		
2002 Grants		
2001 Grants	ArtsWest \$5,000	Date Given: 2005-08-31
2000 Grants		Description: General Support
1999 Grants		
1998 Grants	Cascadia Methow Music Association \$5,000	Date Given: 2003-08-28
1997 Grants		Award Amount: \$5,000 Description: Winter 2004 programs
1996 Grants		





- CalendarX
 - Northwest Danish Foundation
- qPloneDropDownMenu
 - Mathematics Education Collaborative
 - Billings Middle School
- Rotating Image Gallery
 - Billings Middle School
 - Washington Protection and Advocacy





NPower Plone Sites

http://www.childcarenet.org - a redesign, with some additional functionality, and some custom coding for forms and searches for child care - approximately 80 hours

http://www.powerfulschools.org - approximately 60 hour project

<u>http://www.thewscc.org</u> - Approximately 55 hour project - no complex functions - but they were particular about design options.

http://www.siblingsupport.org - A simple site with a new design - with the customer providing both the design and the site map. A 35 hour project

http://www.northwestdanishfoundation.org - a conversion project with a face lift.

- http://www.broadwaybia.org, http://www.cidbia.org, http://www.wccda.org a template based site - these sites share a common template - the major difference is font, color and banner.
- http://clcseattle.org A 55 hour project including a home page that revealed almost all of the rest of the website navigation - so it required additional time for creating the site map and then coding.
- http://web3.npowerseattle.org/bms a 75 hour project they asked for additional design changes near the end of the project, which required re-coding some sections of the website.
- http://web3.npowerseattle.org/sblf a conversion project to allow the customer easy editing access, plus the revamping of a members only section for board members to collaborate. A 57 hour project.





- <u>http://web3.npowerseattle.org/mec/mec</u> a fairly simple site without any complex design or functionality – a 55 hour project.
- <u>http://web3.npowerseattle.org/WPASDonor</u> a site with a strong need for accessible design – but no complicated site architecture or functionality. A 58 hour project.
- http://web3.npowerseattle.org/wda a very complicated site with extended functionality to facilitate searching large legal briefs, streaming media, tiered access based on membership and more.





<u>http://www.millionairclub.org/</u> - a strict conversion to allow for editing - we didn't change a thing. 25 hour project.

- http://www.northwestdanishfoundation.org Both a conversion and a face lift, and some additional functionality. This was a 50 hour project.
- http://www.kongsgaard-goldman.org a strict conversion to allow for editing and for updates of a database driven grant reporting tool. A 75 hour project.





What can you do BEFORE you start writing a scope of work?

Assess if the customer has a budget!

- Determine if the person inquiring has the authority to sign a scope of work.
- Find out if you can meet their hoped for timeline (and how flexible that is!)

Be honest about your skill set.





Most projects have three major components







- A need for high end design. If it is important to get a look and feel that is just perfect that will require more time working with a designer and talking about revisions and so on.
- A website with an enormous amount of data. Websites that have lots of data generally need more time in the information architecture design – think of the Dewey Decimal system for libraries – we have to help you design your site so that all of that data is easy to get to and is where your stakeholders expect to see it.
- Interactive features. We can make your website sell widgets, talk to your donor database, or accept pet adoption referrals online. But those require making sure that you have a database that works, a merchant account, and lots of business rules about pet adoptions.





Adopt the site map and architecture from another Plone site:

- <u>www.wccda.org</u>
- www.broadwaybia.org
- www.cidbia.org















Welcome to White Center!

The White Center Community Development Association (WCCDA) is a community-led organization that seeks to improve the quality of life for White Center residents by focusing on three inter-connected goals:

- Promoting the economic development of White Center, particularly in the downtown business district
- Preserving and creating quality affordable housing
- Building a strong community through advocacy and community engagement

Our vision is a flourishing White Center neighbhood where all residents have opportunities to thrive economically, socially, and politically.

Featured Business

<u>Salvadorean Bakery</u>

1719 SW Roxbury St. Seattle, WA 98106









- Use words like "easy to edit" websites
- Talk about "able to grow" with your needs
- Brag about "edit from any location with a modern internet browser"
- Have them complete a "website start guide" where you trap for their needs regarding audience, branding, functionality and more





- Let them know that they'll have to host somewhere that supports Plone.
- Let them know that while Plone is growing and thriving – it's still easier to find someone that says they know PhP!
- Don't forget to mention Kupu and how it works well – and where it works less well
- Show them a site you've created!

