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Jackson River Proposal

Presented to



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# Executive Summary

We are excited to present the Electrochemical Society (ECS) with this proposal for the development and implementation of a redesigned online presence. Jackson River is a leading Drupal development firm, with over 7 years experience specializing in website development for nonprofit organizations. Jackson River is excited about the possibility to bring our knowledge, experience, and expertise that come with building award winning websites and apply that knowledge to our work on the Electrochemical Society’s new website.

Jackson River believes that creative design and technical implementation are different disciplines, requiring different skills, staff, and philosophy. For these reasons we do not provide create design services and instead choose to partner and work with design firms. That way, those firms can focus their energy providing outstanding design, content strategy and Information Architecture specifically targeted to you’re the user experience your website requires. The Jackson River team are technologists, and therefore we focus our energy on engineering technically sound, stable websites that bring the creative vision to life. For ECS’s project, we will work with a design firm of your choosing, or alternatively, we can recommend firms that we have worked with in the past. Regardless of which design firm you choose to work with, we will serve as ECS’s technical advisor working alongside your chosen design firm to ensure that what is being designed will meet your stated technical goals, is feasible with your budget, and will be easy to maintain once the site is launched.

## What We’re Proposing

In response to ECS’s Request for RFP, we are proposing the following services for this project:

* **Discovery and Design**In order to better build the ECS website, Jackson River will need to engage in a discovery process where we refine requirements and document how the site will work, including key integration touch points with NETFORUM and the ECS Digital Library. Additionally, we will get involved in areas of the site planning and design phase as you work with a creative agency. We don’t need to be involved in every aspect of the design phase, but it is important for us to review and provide technical input on the information architecture, content strategy, wireframes, and final design. During this Discovery phase we will be working on our own implementation documents so that once design is complete we are able to begin the website build.
* **Website Implementation**  
  Once the design and planning phase is complete, we will provide ECS with a build plan which will serve as the blueprint for what we are developing, as well as a project timeline, scope and pricing estimate. Upon approval, we will begin implementation of the new information architecture and design on the Drupal content management system (CMS), creating a new site optimized for engagement on a platform that allows for future scalability and extensibility.
* **Post Launch Support**Once you launch your website, we will continue to support your team with maintenance and security updates, training and administrator assistance, and development of additional features upon request.

If you have any questions or comments, please feel free to contact us directly.

Sincerely,

|  |  |
| --- | --- |
| Tom Williamson, Founder and President  [tom.williamson@jacksonriver.com](mailto:tom.williamson@jacksonriver.com)  202.588.5641 |  |

# ECS Project Approach

Although specific activities and deliverables will depend on the outcome of our discovery phase and the final creative designs, we propose the following approach to the ECS project. We prefer to work in a highly collaborative fashion with our clients to ensure that we’re delivering what you need, when you need it, and within your organization’s budget.

## Discover & Design

**Discover:** Our first order of business is to get to know your organization – to learn about how you work, the details of what you’re trying to accomplish online, and how best for us to align technology around your goals. Your Jackson River team will dive into your needs, goals, current systems, and the problems you’re trying to solve, so that all of our recommendations will fit within your organizational ecosystem and your budget. During the discovery phase, we may use methods such as stakeholder interviews, process evaluation, current data and performance analysis, and design and functional review to build a complete picture of current challenges and how we can help address these to meet your organizational goals. Once we’re thinking like members of your team, we then design both a project approach and a technical solution.

The **project approach** encompasses the working plan that will get our joint teams from conception to launch, including a finalized budget and scope, detailed project timeline, clear-cut areas of responsibility, and communication, sharing, and tracking tools to best facilitate our collaboration. You’ll find more below on tools we typically use.

The **technical solution** is our blueprint for developing and integrating all of the complex pieces of your technology puzzle. Your organization thinks big, and to be successful, you’ll need at a minimum a well-constructed integration with NETFORUM, the ECS Digital Library, intuitive content publishing workflows, and pixel-perfect implementation for desktop, mobile and tablet devices. We work together with you and your chosen design firm to architect end-to-end solutions that translate the creative to the functional, map the multi-directional flow of data through systems, and spec out any needed custom development according to your requirements. In addition to documenting our development tasks, our solution will plan for key areas including how (and what) content needs to be migrated and Search Engine Optimization. Develop & Integrate

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| Develop and Integrate **Develop** And then, we build. While our end-to-end process involves discrete milestones and checkpoints, during the Develop stage, we tend to follow a more “agile” process, in order to give your team many opportunities for input and confirmation. Our philosophy is that once there’s something to show, we show it, in order to avoid surprises or misunderstandings that can be costly when discovered too far down the line. We ask our clients to play an active role as reviewers and collaborators during this phase, to make sure that we’re achieving the vision mapped together during the Design phase, and that we’re able to surface any new requirements or course-correct quickly together.  **Integrate** As development progresses; we turn our attention to a parallel set of processes – getting all of your systems to connect. Whether it’s making an integrated view of your online and offline activities, connecting front-end content with back-end data, synching up advocacy or email solutions, exploring data warehousing, or smaller bits of integration like testing and tracking tools, we think about integration both in terms of data movement and also “use cases.” Our job is to uncover and project all the ways in which you might want to view, use, and manipulate your data, and to create easy integration and robust reporting that you can build on over time. |

## Train and Enable

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| **Enable** Our goal is to enable your organization to take complete, long-term ownership of these tools. Over the years, we have found that a “train the trainer” approach works best, in which we also do deep-dive training with one or more of your staff, giving them a masterful level of knowledge to facilitate in-house ownership of the system by your team. When a need for additional training arises, whether through staff turnover, change in roles, or a desire to go deeper with the tools, you can either utilize your in-house expert, or call on your Jackson River team.  In addition to our custom approach, we often point clients to the vast repository of free resources out there that can help them extend their knowledge of open-source CMS tools such as Drupal, of CRM concepts and the ins and outs of Salesforce (including our own repository of videos on Forcify.me: <http://www.forcify.me/>), and of interesting best practices research, ideas, and resources that their team might find useful.  **Train** To us, training is an ongoing activity that helps organizations take increasing ownership of the toolset and grow the ways they leverage Drupal over time. We start training early in our projects by helping key staff to understand the conceptual model of Drupal, so that they can play an active role with us in driving the technical solution.  However, a one-size-fits-all approach rarely matches the organizational complexities of modern nonprofits, where many individuals wear multiple hats; roles can be divided between departments; and interns, volunteers, or backups may need to cover critical tasks for the organization. As a project progresses, we shift our training activities to a more role-based approach that involves short, webcast training sessions by our project team. These sessions are customized for your specific tasks, such as the nuts-and-bolts of Salesforce; content editing and maintenance; reconciling donations and sustainers; and the nitty gritty of how Springboard and Salesforce talk to each other. |

## Verify & Launch

**Verify**Once development and integrations are complete, we enter an intensive verification period, with a heavy focus on quality assurance (QA) and user acceptance testing (UAT). While we take the lead in testing, the Verify phase is a collaborative process between our team and yours, which may also involve your design partner or other service providers. Once we’re happy with our work, we’ll engage your team to perform a testing plan including detailed instructions on how to test, and walk you through the process. We verify along two dimensions:

* **Content & Design:** We perform extensive QA of your audience-facing site, working with you and your design vendor to make sure that your initial creative vision has been fully realized. This means extensive testing across browsers and devices, triaging and prioritizing issues as they are identified to achieve a pixel-perfect end user experience.
* **Data:** Behind the scenes, we go through a period of testing every possible data flow to make sure the data is transmitting and landing securely. This includes making sure your systems are capturing the right information, transmitting across toolsets and providers such as Salesforce, another offline database, through the payment gateway, and between other specialty systems. Depending on your set up, we will also perform very specific regression testing, automated testing, and load testing.

**Launch**When it’s time to launch, our approach is “all hands on deck” – for both our staff and yours. We make sure that all priority issues are resolved and signed off on by your team and then work together to perform the necessary switches to make your project accessible to the world. We follow a master launch checklist that’s tailored to the division of labor agreed upon by our teams, to ensure that we’ve addressed every small contingency for a smooth launch.

## Support & Grow

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| **Support** While launch is an important milestone, we believe that it’s just the beginning of our work together. As your team stabilizes with your new toolset, your project team and our Support group are here to help with the transition. We find that our Support work typically begins with lots of how-to questions, and over time evolves into more in-depth support around how to extend the Drupal CMS, address a business problem, or help expand your team’s skillset.  **Grow** We’re excited to see our clients using Drupal and their other tools to transform the way they engage with their members and constituents. We know you have ambitious goals and ideas, and we want to be the partner you call on when you’re ready to advance a strategic program or direction. New microsite or campaign? New testing or reporting? Interested in new member management and fundraising tools? Through our ongoing monthly engagement with clients, we help them build on their toolset, measure their success, and leap forward with increasing speed and sophistication. |

## Launch

While launch is an important milestone, we believe that it’s just the beginning of our work together. As your team stabilizes with your new toolset, our Support group is here to help with the transition. We find that our Support work typically begins with lots of how-to questions, and over time evolves into more in-depth support around maximizing efficiency and taking advantage of new technologies and trends in online marketing.

## Project Leadership & Communication

At Jackson River, our project managers (PMs) are strategists, nonprofit experts, and most of all trusted consultants who will know every nook and cranny of your project. Our PMs have deep technical experience in the Drupal CMS, CRM and fundraising toolsets and are all-around great resources with lots of industry perspective to offer your team. Your PM will use a variety of tools during the project to facilitate clear communication, team member collaboration, and of course a project that is on time, within budget, and of the highest quality. Our standard project tools include:

**Project Oversight & Tracking: Assembla**

**All of our project activity is centrally managed through Assembla, a collaborative “workspace” tool that we use for both our build projects and ongoing support. During a project, we use an Assembla wiki to keep centralized links to all project documents as well as assigning and communicating about individual tasks across the combined Jackson River and client team.**

**Project Planning**

Every project has a project plan that includes a detailed task list, dependencies between activities, ownership, and a master schedule. Depending on what works best for your team, we will use one of several project planning tools to create and manage the plan, and then share it with you weekly, so that you always have the bird’s eye and ground-level views of our progress.

**Time Tracking: Harvest**

We use Harvest to detail our time on projects and keep them on budget. We track our time daily, which means that your PM always has up-to-date insight on how many hours we’re spending on which activities. We’ll provide a weekly update on hours used, but can also produce real-time reports to evaluate budget tracking on a moment’s notice.

While a typical Jackson River project might employ some or all of these communication channels, we’re flexible. Frequently an organization’s design agency might choose to use a collaboration tool like Basecamp, or our clients might want to hold our weekly status calls via video chat. Whatever your preferred method, we’ve probably tried it, and we’re on board.

## Why Drupal?

There are certainly many of wonderful CMS systems out there to choose from. We would never say one is the “best”, because being best really depends on the project for which you are building. That being said, we believe Drupal is a great choice for many non-profits for a variety of reasons. First, Drupal is one of the most popular open source CMS systems available today and powers some pretty impressive sites. From Whitehouse.gov, weather.com, to the Grammy’s, Drupal’s popularity has driven wide spread adoption among government, private sector and nonprofit organizations. This popularity is driven and supported by one of the largest, most active, open source communities available today. This means there are many developers who are able to support and enhance your website should you decide at some point to bring in internal developers.

Additionally, Drupal is more than a CMS. Sure, it is a powerful content engine, but it can also serve as a framework in which to build your own applications. In fact, we have invested so heavily in Drupal we have built our own digital fundraising and marketing system, Springboard, largely within the Drupal 7 framework. The take way is that Drupal is great at producing content, but can also be extended with custom features and integrations with other systems, such as NETFORUM.

Drupal is a modern CMS, and continues to evolve and innovate – keeping up with the pace of the modern web. When new services, innovations, and trends emerge Drupal is often at the forefront with the community developing new modules and techniques that benefit everyone within the ecosystem. With regards to ECS, mobile, analytics and SEO are some key benefits that Drupal provides

*Mobile*

Jackson River has extensive experience building websites that are optimized for mobile traffic. We primarily handle mobile optimization by building sites that respond to the device by delivering an optimized layout and content experience. This is something we will work with the design firm and ECS to plan how pages will need to respond to a variety of devices with a wide array of viewports. Drupal itself is well suited for mobile optimization and out of the box provides core mobile optimized templates that we will work with during your implementation.

*Analytics*

At Jackson River we live data and have a special place in our heart for analytics. Within our fundraising system that we built, Springboard, we have developed a unique multivariate system for optimizing of donation and member contribution forms. While this project doesn’t include fundraising or member management, it is in our DNA. We will certainly be implementing your choice of website analytics tracking, and can assist with more advanced tracking using tools such as Google Tag Manager. If you are interested in setting up conversion events within the site to integrate with Google Analytics, or creating custom funnels we can help make that happen.

*SEO*

Because SEO techniques continually evolve, you need a system that will support you now, and be able to change over time. We always follow best practices with regards to SEO – starting with how we implement pages to take advantage of HTML content hierarchy that search engines use. Secondly, we will install and configure a suite of tools within Drupal specifically designed for SEO. URL redirects (key in any site migration!), site map submissions, site verification spam protection, Google Analytics are just a few of the modules that we will set up during this process. In addition, we can work with your SEO firm (or recommend one) to help research and propose keywords and meta-tags for key content so that your site is optimized for the right searches.

## Hosting

There are many hosting choices available for your Drupal based CMS, but we recommend Pantheon for our clients. If you already have a hosting provider or another preference, we can certainly work with any hosting vendor provided that can support Drupal. We have included more information on their hosting as an addendum to this proposal. Some reasons why Jackson River recommends Pantheon:

* They know Drupal, and built their hosting platform for Drupal
* A great support team for us and our clients
* Cloud based system that can scale up and down with your needs
* Friendly developer tools designed for Drupal that make upgrading and managing development, staging, and production environments more efficient.
* Powerful Caching – caching of your site so you can handle more load with less computing resources. Caching is that core of every high traffic website.

## Training

To us, training is both part of the initial implementation project and an ongoing activity that helps you take increasing ownership of your Drupal based website. We start training early in our projects by helping key staff to understand the conceptual model of Drupal and how we will build your site, so that you understand the decisions we are making which are going to be a part of your daily content authoring process post launch. In addition to getting key staff involved early in the process, we will provide content administrators with a custom training based upon your *specific* Drupal implementation and how they will need to manage content. Often times, we pair this with any content production tasks that need to happen so that your team can put into practice what they are learning. This gets your team self-sufficient much quicker than if we load all your content and try to turn over the keys

## Content Migration

Where possible we try to automate the migration of content, saving you both time and money. We typically find that in most redesigns there is content that can be automatically ported (think blogs and press releases), content that needs to be re-written as its outdated, and content that needs to be adjusted because the new design calls for new attributes (new article images for example). As your design agency is working on your IA and content strategy, we will be advising for how content from the old site will map to the new site and identifying what can be automated, and what would need to be manual. Once determined, there are several ways for us to automate bringing the content from your current system and into Drupal. One of the biggest drivers to this process though, is the final IA and mapping of content between the old and new site. Within our pricing estimate we have accounted for up to 30 hours of automated content migration, but the final specifics on scope and process will be determined during discovery. In addition to content migration, we also need to look at migrating member accounts for the password restricted areas of the site. Drupal’s migration utilities provide a mechanism to map both content and user accounts over during the migration process.

## Integrations

Rarely are we building a website that doesn’t contain at least one integration to an external system, whether that is our own Springboard fundraising system, Salesforce, Blackbaud, or Avectra’s NETFORUM. For ECS, we understand the need to provide your members with a unified experience by ensuring that the newly designed website mirrors the look and feel of your NETFORUM pages. We have experience working in many systems, but we recommend contracting with a firm that specializes in NETFORUM. On our side we can help improve the content that is being served out of NETFORUM (<https://community.electrochem.org/eweb/DynamicPage.aspx?WebCode=ecscmtebod>) to ensure it is being presented within the new website design for consistency. Additionally, as part of the IA process with the design firm we will make sure that there is a solid approach outlined for how users will move between Drupal, NETFORUM, and the ECS Digital Library. We also have experience integrating with email service providers (ESPs) and as part of the website can ensure that email signups on the main Drupal site flow seamlessly to email product.

# Sample Work

Over the years our clients have won awards, improved member and constituent engagement, and have met their goals online. We are proud to work with such amazing groups and hope that ECS will join the list below of amazing projects:

**Client**: ASPCA

**URL**: [www.aspca.org](http://www.aspca.org)

**Project Summary:**

Jackson River was hired to convert ASPCA’s web presence into Drupal from a vendor who did not understand nonprofits and their needs around constituent engagement. During the process we integrated ASPCA’s new website with Springboard for online fundraising, Salesforce CRM for constituent management, and numerous payment systems (PayPal, Vantiv and PSI). ASPCA did not re-design their site during this process and was not intended to be mobile optimized. ASPCA is currently redesigning their website and Jackson River will be implementing the new designs, along with mobile optimization, into their Drupal infrastructure in summer 2015.

**Client**: UNICEF USA

**URL**: [www.unicefusa.org](http://www.unicefusa.org)

**Project Summary:**

Jackson River was engaged to implement a newly designed, responsive website for UNICEF USA in partnership with Threespot for the creative design. The site is powered by the Drupal CMS and features a community login portal for constituent engagement, powers all their online fundraising efforts, and is integrated with Springboard for online fundraising, Salesforce CRM for constituent management, and several third party systems. Jackson River continues to work ongoing with UNICEF USA enhancing and building additional features into their online presence.

**Client**: Drug Policy Alliance

**URL**: [www.drugpolicy.org](http://www.drugpolicy.org)

**Project Summary:**

DPA engaged Jackson River to handle the Drupal CMS implementation for their newly designed C3 and C4 websites (non-responsive). Jackson River built the site in Drupal and provided integration points with Blackbaud’s Convio for email sign up, fundraising and advocacy.

**Client**: The Marfan Foundation

**URL**: [www.marfan.org](http://www.marfan.org)

**Project Summary:**

Jackson River, working in conjunction with Big Duck for design, implemented a new Drupal CMS website for The Marfan Foundation that also includes integration with Springboard for fundraising and Salesforce CRM for constituent engagement.

# About Jackson River

Jackson River is a Washington, DC-based technology consulting firm that works with select influential non-profits, cause-based initiatives, and progressive foundations. Our purpose is to support and strengthen organizations doing good work in the world by using technology to enhance the impact of their cause.

## Our Philosophy

We believe that the right technology can change the world – when it is understood as one element in an organization’s greater ecosystem, operating in service of your long-term success. Every Jackson River project begins with this big-picture organizational view, understanding your structure, capabilities, business processes, marketing objectives and strategic goals, in addition to your technology infrastructure. As a result, Jackson River offers your organization both a toolset and a partnership that:

* reflects a “best of breed” approach in terms of industry expertise, strategy, and technology;
* is fitted to your needs and resources;
* integrates beautifully with your other technologies and partnerships; and
* Your staff is prepared to leverage with increasing sophistication for many years to come.

## Our Experience

Jackson River was founded by three veterans of the nonprofit technology, marketing, and strategy world. In 2008, we saw a critical need to help organizations harness the power of open-source and best-of-breed technologies to do good work in the world. As we’ve grown, we’ve built a team of experts that includes direct nonprofit experience; cause marketing expertise; technical experience with applications and websites for nonprofits; and the nonprofit software industry.

Our digital strategy, our software, and our staff are steeped in the broader context within which organizations are challenged today. Our solutions are informed by:

* The latest in supporter **engagement strategies** and tactics
* The ever-changing landscape of **technology and tools**
* The diverse **operational models** of different types of nonprofits

## Our Team

When you work with Jackson River, you get a team that:

****Is Smart and Helpful.****

We strive to be full partners in your success, and are always on the lookout for new ideas and perspectives that your organization might bring to bear. Our clients tend to ask us to the table early in a project, to help think through how best to integrate strategy with technology.

Plays Well With Others.

Because we support our clients throughout an initiative, we frequently partner with design firms, strategy consultants, PR agencies and other technology shops. We appreciate the new ideas and new ways of thinking that a collaborative approach offers, and take a “check your ego at the door” approach.

Knows Technology, But Thinks Like Marketers.

We’re technology geeks, social and mobile experts, testers and data heads, and advocacy and fundraising people. Most of all, we’re consultants who are rooted in the goals that matter most: building and growing supporter engagement; maximizing conversion and revenue; increasing a sustainer base; reaching supporters in more channels and contexts; and doing all this with increasing effectiveness over time.

Communicates Well and Often.

We believe that the key to success in every initiative is clear and effective communication. Our style is infused with humor, in service of building strong working relationships; collaborating effectively; keeping everyone focused on the same goals; and getting the job done on time and within budget.

Balances Quality and Efficiency.

We work smart, and we work hard. Our commitment is to deliver top-notch technical solutions to our clients while also respecting the very real budget and timeline constraints that they face as nonprofit organizations.

Will Love Your Cause As Much As You Do.

You believe passionately in the work your organization is doing. We do too. Our staff members choose a career with Jackson River in order to work with some of the most extraordinary causes in the progressive sector. We get on board with your mission, and commit to making your digital initiatives a success. We want you to be happy *and* effective.

# Project Milestones and Budget

### Project Timeline

During the discovery phase we will develop a more complete and detailed project timeline, but based on our experience we anticipate the entire ECS website project will take approximately two months for discovery and design, and then approximately 17 weeks from design hand off till launch. Once a design firm is chosen, we will need to coordinate the overall schedule with them and with ECS’ resources to ensure this is still viable.

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| --- | --- | --- |
| **Task** | **Begin** | **End** |
| Discovery and Design Consultation  (running in parallel with the Design, IA and Content strategy process) | 4/1/2015 | 6/1/2015 |
| Drupal Implementation | 6/1/2015 | 8/15/2015 |
| NETFORUM and ECS Digital Library Integration | 8/1/2015 | 8/30/2015 |
| QA and Testing | 8/31/2015 | 9/18/2015 |
| Launch | 9/22/2015 | 9/22/2015 |

### 

### Pricing Estimate

Jackson River prices all projects on a time and materials basis. The following estimate reflects an hourly rate of $175/hour. Our initial estimate is based on the information we have at the time of this proposal, and we fully expect to refine the scope of the project during the discovery and design consulting phase of the project. At the conclusion of our discovery and upon receiving final design collateral from the design firm we will provide ECS with an updated estimate and Statement of Work (SOW) before beginning implementation. While we would love to be able to give firm pricing at this stage of the process, our experience is that we can only provide rough pricing at this stage and the scope needs to be finalized in order to provide a more accurate estimate.

|  |  |  |
| --- | --- | --- |
| **Task** | **Hours** | **Cost** |
| Discovery | 40 – 60 | $7,000 - $10,500 |
| Design Consultation | 20 – 30 | $3,500 - $5,250 |
| Drupal 7 CMS Implementation  (integration with NETFORUM and ECS digital library is included in this line item) | 350 – 450 | $61,250 - $78,750 |
| QA and Testing | 42 – 54 | $7,350 - $9,450 |
| Project Management | 85 – 102 | $14,875 - $17,850 |
| Total Estimate | 537 - 696 | $93,975 – $121,800 |

The pricing provided is only for Jackson River services and does not include hosting, design, or any other third party services.

### Estimated Ongoing Annual Costs

Jackson River offers clients the flexibility of having an hourly time and materials agreement for support post launch at the rate of $175/hour, or clients can purchase a monthly retainer at a discounted rate. For example, ECS could buy a 10 hour/month retainer at a discounted rate of $160/hour. The hours within this retainer are used for Drupal security updates, administrator support, or maintenance.