SB|cera

San Bernardino County Employees'
Retirement Association

Website Redesign

2022 CAPIO EPIC Awards
Digital Communications
Website

INTRODUCTION

The San Bernardino County Employees' Retirement Association (SBCERA) is a defined benefit pension plan providing retirement, disability, and death benefits on behalf of approximately 44,000 members and beneficiaries. SBCERA serves 16 employers throughout California and its public website is the hub of communications for our members, employers, and other stakeholders. In July 2019, SBCERA engaged Digital Deployment to partner in a complete redesign project that would deliver a user-friendly website that supports the needs of all our members and stakeholders alike. Together with Digital Deployment, SBCERA initiated a successful full top-to-bottom website overhaul that included an in-depth review of website analytics, visitor behavior, and incorporated this information that led to a new design, core functionality, and enhanced accessibility of the revamped website. Our new website offers an enhanced user-experience with its intuitive design, easy navigation, and fast access to information.

RESEARCH

SBCERA began the research phase for this project by looking to our industry peers for insight. We developed a proposed scope of work and request for qualifications, which was distributed through a number of other resources, including the CAPIO network. SBCERA's Board ultimately authorized staff to sign a contract with Digital Deployment for a new website. The following research occurred during the research and discovery phase of this project by Digital Deployment and SBCERA:

Stakeholder Survey: A stakeholder survey was conducted that incorporated a careful mix of both quantitative and qualitative questions, allowing us to proactively collect valuable feedback about user experience with the current website and learn what participants would like to see in the future.

Website Analytics: Website analytics helped deliver important data about our former website. Through this data, SBCERA was able to obtain visibility in the areas that needed to be further developed or improved. It empowered SBCERA to make data-driven decisions that allowed us to focus on the organization's efforts to better meet the needs of our members and stakeholders.

Discovery Conversations: Digital Deployment led the team in a website discovery meeting that blended data, analysis, and thoughtful conversation to draw out any new insights that might have arisen independently and develop a plan to move forward. This discovery conversation included both top leadership and staff.

Discovery Digest: A discovery digest was created for the project, which served as a guiding document and a north star for the project. This document included an organizational overview, an outline of the primary and secondary audiences that the website needed to serve, the core goals for the project, and a detailed listing of the technology that we'd need to successfully integrate to create an outstanding user experience for our members.

Research Revealed:

- Members and retirees were ready for a fresh and modern look. Feedback indicated that members were looking for modern tiles, helpful quick links/shortcuts, and immersive visuals that would instantly make them feel welcomed as they sought out answers.
- We discovered that members are extremely interested in using the website as a self-service tool. Accordingly, integrating member portal logins, easily downloadable forms, fast access to estimates, and pension payment dates at-a-glance was an essential component of the design.
- We learned visitors often visit the site when they have a sudden change in their job or life. So, we needed to create dedicated design and content to inform visitors of how to manage life events quickly and easily.

- The new site needed a built-in alert system that could notify members of important updates without compromising the design. By developing a custom alert bar functionality, we were ready to keep members informed about temporary office closures when COVID-19 hit, without blinking an eye.

PLANNING

Digital Deployment and SBCERA worked closely in the project management piece of the website redesign using a comprehensive strategy. The **goal** of the website redesign was to clearly communicate about SBCERA's retirement benefit plan and all of the relevant educational information through a dynamic, accessible website. Our **objective** was that by May 2020, we would launch the SBCERA's redesigned website, incorporating best practices and findings from the research and discovery phase. Our **strategy** was to build a new website to meet the needs of all our members and stakeholders alike. The **tactics** we used included redesigning the website, leading with an accessible design, and overall website branding. The **budget** for this project was $150,925. The **project timeline** kicked off in early July 2019 and was completed by May 2020. Our targeted **audiences** were SBCERA members, beneficiaries, employees, and key stakeholders.

IMPLEMENTATION OVERVIEW

SBCERA and Digital Deployment collaboratively used the following comprehensive strategy included four stages:

- **Phase I: Discovery** – In the discovery phase, we identified the gaps between what the website was and what it needed to be. We developed strategic solutions to close those gaps by means of information architecture, design, and content strategy.
- **Phase II: Design** - The design phase included developing a fresh website to reflect SBCERA's brand, while delivering superior digital user-experience.
- **Phase III: Site & Content Development** - The site and content development phase included refining the website's content and implementing the backend CMS.
- **Phase IV: Training** – The training phase empowered SBCERA staff to manage our own content with comprehensive training. This training included best practices, governance, and workflow tips.
- **Phase IV: Launch** - The launch included planning and successfully bringing the new site live to the public.

RESULTS/EVALUATION

SBCERA **successfully met its goal** of creating a custom website that would put the power in the hands of the visitor upon arriving to SBCERA's digital front door. SBCERA also **successfully met the objective** of launching a full top-to-bottom website by June 30. This objective was accomplished through an in-depth review of website analytics, visitor behavior, and incorporating this information that led to a new design, core functionality, and enhanced accessibility of the refreshed website. SBCERA's new website can be viewed at www.SBCERA.org. Since the launch, we've seen a 43% increase in website visitors. Pageviews have increased by 164% percent. Beyond this, visitors are spending 32% more time on the site to find the answers they need without ever having to pick up the phone or send an email.

BUDGET INFORMATION

This project was accomplished through staff's daily work hours and in partnership with Digital Deployment Digital Deployment's budgeted contract was not to exceed $150,925, paid in installments at key milestones. This budget also included the website SLA at $1,600 per month. The total amount of staff time spent to accomplish this plan was approximately 280 hours.

Supporting Materials
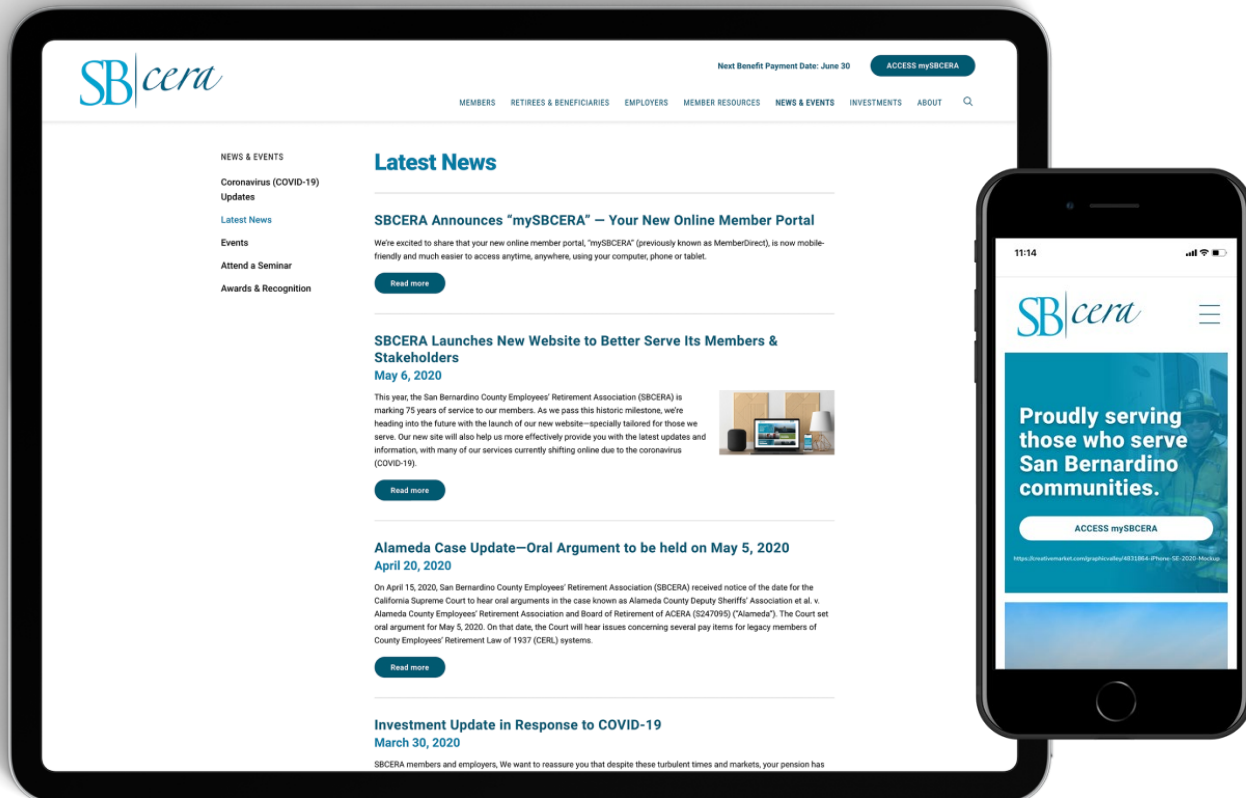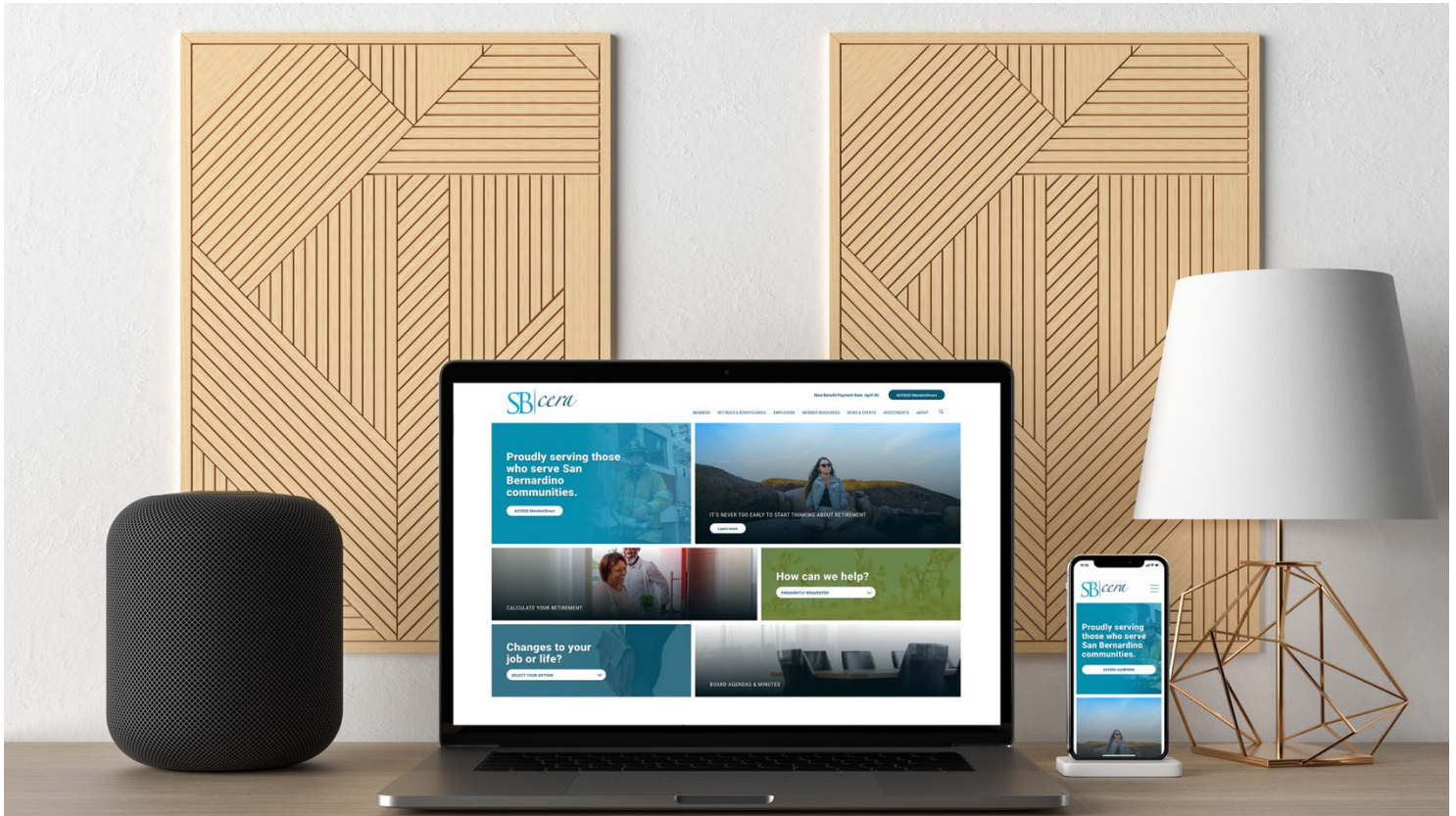
Old Website Prior to Project

Below is a "before" visual of our website prior to launching our new website. This highlights the drastic upgrade and change our new website brought to SBCERA.

Digital Deployment
Proposal

RFP for **SBCERA** Website Redesign, Development, Implementation and Hosting

Questions may be addressed to:
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www.digitaldeployment.com

Digital Deployment, Inc.
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Sacramento, CA 95816
Federal EIN: 26-3341975
CA Small Business Certification: 1770310
CA Multiple Award Schedule (CMAS): 3-19-70-3077B

**DIGITAL
DEPLOYMENT**

DIGITAL DEPLOYMENT

Thursday, May 16, 2019

Mr. Michael Tamony, Communications Officer
San Bernardino County Employees' Retirement Association
348 West Hospitality Ln., Third Floor
San Bernardino, CA 92415-0014

Dear Michael,

Enclosed is Digital Deployment's response to the SBCERA Website Redesign, Development, Implementation and Hosting RFP.

Digital Deployment is a full service website development firm, located in Sacramento, California, focused on all facets of development including research and strategy, design, content strategy, technical implementation, and CMS platform training. We have produced and successfully deployed more than 300 websites since our founding in 2004. Our strong design track record is grounded in research methods including qualitative and quantitative activities to produce compelling online experiences that engage audiences to ultimately drive action.

As an industry leader in pension websites, we have helped over a dozen public pension systems maneuver the difficult website development process. We are also active members in the Public Retirement Information Systems Management (PRISM) Association and the National Pension Education Association (NPEA). From **CalSTRS** to the **NYCERS**, we enjoy the challenge of creating robust yet clean self-service websites for entities that serve the public. We stand out from our competitors because of the ongoing support we provide clients post-launch. In fact, of the clients we had five years ago, **more than 95% are still active clients today**.

We hope we have the opportunity for an interview so that we may learn more about you and share our unique approach to building sites.

We accept all RFP and contract terms and conditions and acknowledge that we have received all addendums. We propose no alternative requirements to the RFP and Acknowledge and agree that any resulting contract and services will be subject to and interpreted by the laws of the State of California, any litigation with respect thereto shall be brought in the Superior Court of California, County of San Bernardino. Digital Deployment carries Commercial General Liability, Workers Compensation, and Professional Liability and can supply a certificate of additional insured upon contract negotiations.

Thank you!

Rocky Martin

Rocky Martin
VP, Sales and Partnerships

Executive Summary

In a world where website development projects are often complicated and fraught with risk, Digital Deployment found its calling. We exist to help organizations navigate the website development process with ease. We have a unique reputation: in our 15-year history of building more than 300 websites, we have never gone over budget or issued a change order.

Process: Creating a website should be more than successful–it should also be delightful. Our proven process instills confidence, taking projects from initiation to launch in a predictable, transparent way.

- In-depth **discovery** services explore your purpose and engage stakeholders to align the entire organization on project goals. After all, your website redesign process might be the first time various parts of your organization have communicated.
- Our team inventories your current **content**, develops a migration strategy, and deeply analyzes empirical user data to bring the 10% of content that 90% of users are looking for to the forefront, so your users can find things quickly and accurately.
- Our team of designers create powerful **designs** that "listen" to user needs and drive key actions, then we refine the design until it's ready for implementation.
- Our developers bring your site to life when they **implement** your new design, features and functionality. As you work with your content, a dedicated front-end developer and strategist will continue to refine your site: making it more engaging and improving its overall usability.
- We empower you to manage your own content with comprehensive **training**, guiding your team on content best practices, governance, and workflow, so you can launch and maintain a website that reflects the very best of your organization.

Technology: Our technology platform is open-source, so you don't get locked into any one vendor. It's powerful because it uses Drupal, the #1 enterprise content management system. It's mobile-friendly, meets modern web standards, and supports Section 508 compliance to ensure access for users with disabilities. Best of all, our usability layer provides a uniquely user-friendly content management experience: it puts you in complete control of your content and workflow, even content shared to mail lists or social media.

Support: Because of our platform and service level agreement (SLA) program, more than 95% of the clients who joined five years ago are still active clients today. Whether you need help thinking through a new landing page, training a new staff person, or need a guaranteed 30-minute response to an urgent issue 24/7—our comprehensive support program ensures you get help from the same Sacramento-based team that built your website.

Company: Founded in 2004, our company operates over 300 websites. Yet our people are our greatest asset. By supporting the passions of our team and investing heavily in leadership and professional development we have enjoyed a profound employee retention rate: only one departure in the last five years. For our clients, this means extraordinary operational continuity, deeper institutional memory, and

an emphasis on productive long-term relationships. We have been named the #1 Best Place to Work and Healthiest Employer by the Sacramento Business Journal.

Project team: The team that will work on your site has a broad array of skills and is deeply experienced. We've included detailed bios and relevant experience for your reference.

References: We have a proven track record with organizations like yours.

- **Maryland State Retirement and Pension System**
- **Sacramento County Employees' Retirement Association**
- **Ventura County Employees' Retirement Association**
- **New York City Employees' Retirement System**

Pricing and Terms: Full terms and pricing breakdown can be found at the end of this document.

- Project is not to exceed **$150,925**, paid in installments at key milestones.
- Platform and support (SLA program) is **$1,600/mo** and can be canceled anytime. (no contract)
- The project **timeline** is expected to last between six to eight months from contract execution to launch, will vary based upon your needs.

At Digital Deployment we are passionate about making the process and the outcome equally delightful. We want to use our experience to ensure your new website is one you will be proud of, and we'd be honored to work with you.

Table of Contents

Process

We believe creating a website should be more than successful–it should also be delightful. We have worked to create a process that instills confidence, taking projects from initiation to launch in a predictable, transparent way. Our process addresses Phase 1: Design and Phase 2: Implementation of your RFP. Phase 3: Post-Launch Evaluation and Support will be handled by our Service Level Agreement which you can learn more about in the support portion of the proposal.

Timeline

The project timeline is typically between six to eight months from orientation to launch, and varies based upon your needs and the availability of your team.
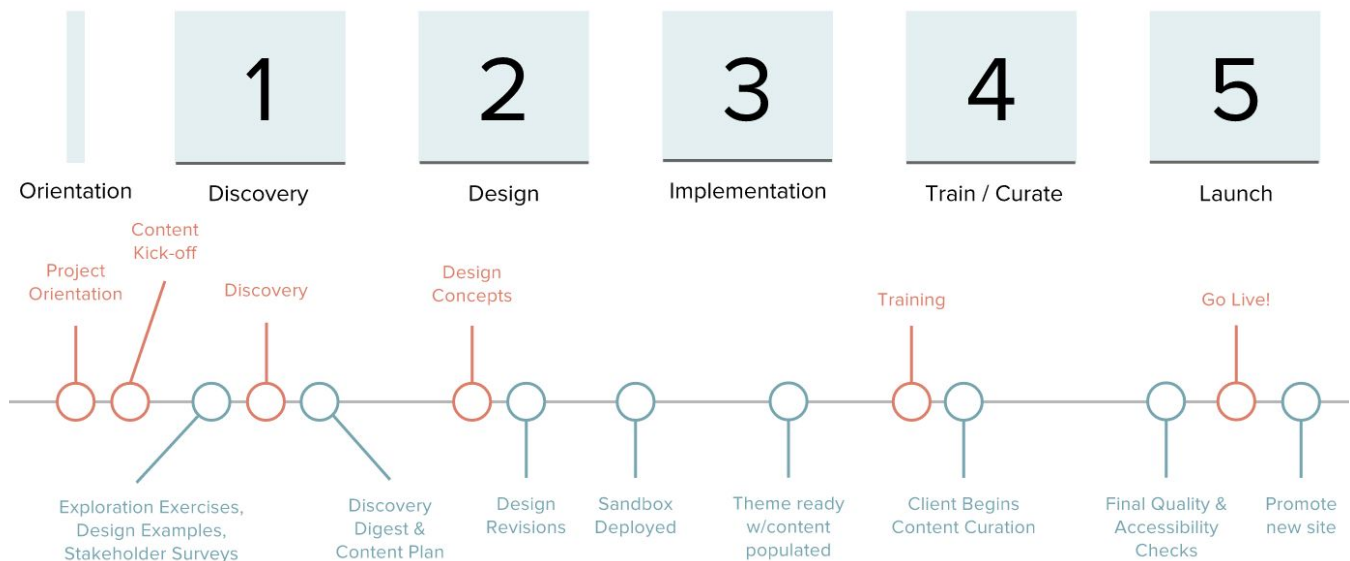
Project Kick-Off

Intention: This one-hour orientation meeting is intended to define project expectations and review scope, identify client content leaders, and help participants become familiar with the process and our team.

Key meetings: 1 hour with our team and your primary web team

Content Track

Intention: To work together to bring the typically small fraction of content that the overwhelming majority of users are looking for to the forefront, so your users can find things quickly and accurately. We work with client to plan and complete all required content services. The content track runs alongside the rest of the process, from orientation through launch.

We develop content management systems, which means content is a big priority for most of our clients. Proper planning and execution of content services can make a project (and poor planning or execution can break it). Because of this, we have created a dedicated Content Track that hums along beside the other phases to make sure content is in good shape in time for launch.

- Our Content Specialist completes an inventory of all site content and identifies content that may need special treatment or custom templates.
- A content strategy is created that outlines how content services will be completed, including migration timeline, if applicable.
- Migration of content from old site to new, using best practices and setting content up for easiest maintenance possible.
- Our Content Specialist will work with you to determine who needs to be trained on the new site and what the best training strategy for your team will be.
- After training, content curation phase takes place. Our Content Specialist provides content guidance for home page and other vital sections.

Key meetings: 1 hour content orientation and planning; follow up meetings / phone calls as needed.
Deliverables: Content inventory, strategy documents, content plan, training strategy.

1   Discovery

Intention: the discovery process helps us understand your organization's objectives, challenges, and audiences, as well as what each audience needs from the website. It also serves to align your stakeholders on project outcomes and goals.

In the discovery phase we identify the gaps between what the website is now and what it needs to be, and develop strategic solutions to close those gaps by means of information architecture, design, and content strategy. Discovery, content, information architecture and design are all one big conversation that helps us discover the tone of your organization.

- "Exploring your Purpose" exercises help you articulate, and us understand who you are for the world. It helps build consensus with stakeholders to allow us to embark upon the project with a unified set of goals in mind and a clear understanding of expected outcomes.
- User stories (or personas) help us imagine site visitors and what they are trying to accomplish.
- Stakeholder surveys help gather input from important groups that may not be a part of your website project team (board members, community members, staff, etc).
- Focus groups are sometimes appropriate when you just can't get the information you need from surveys, and you want to have in person conversations to gather more detail.
- A review of existing analytics helps us understand current site visitor behavior.
- Drafting the information architecture this early in the process gives us a place to start. IA is a process, not a solid plan; as content and navigation and design start to come together, we'll be able to make adjustments to better serve your audiences.
- A website field trip helps us determine your team's visual and design preferences.

Key meetings: 2-3 hour discovery meeting with primary client web team and desired stakeholders to review findings and draft information architecture; website field trip. Focus groups and follow up calls as needed.

Deliverables: discovery digest including project overview, goals, audiences and challenges, draft information architecture.

2 Design

Intention: to provide designs that reflect your organization's aspirations and strategic goals, and that reflect everything we learned in Discovery.

The design process includes however many iterations it takes to get it right. We're usually pretty close on our first attempt, but if the designs need more work, we're on it.

- From the website field trip and everything learned in Discovery phase, designers create and refine two powerful designs that "listen" to user needs.
- You choose a direction, and design is refined in iterations until it's just right, and ready to be implemented in the sandbox.

Key meetings: 1 hour design review, follow up meetings and phone calls as needed.

Deliverables: a complete, approved design for the home page, main landing page and mobile. (If scoped, designs for microsites or special templates may be delivered at this time as well.)

3 Implementation

Intention: to take the approved designs and make them a reality in your sandbox, and deliver a sandbox ready for training, with all required features and functionality.

This is the phase when we're a bit radio-silent except for content related things.

- Our front end developer implements design, including home and subpages, and mobile responsive functionality
- Required features are tested, QA performed
- Site reviewed for content and theme completion

Key meetings: none.

Deliverables: fully themed website ready for training.

4 Training

Intention: to empower you to manage your own content with comprehensive training.

- You'll learn how to edit/add/delete content on your new site, update the site map, manage users, and more.
- Content best practices, governance, and workflow tips
- Ongoing content maintenance strategies to help you keep your site up to date
- Train the Trainer approach - enable client work team to train additional staff members if desired

Key meetings: All day (approx. 6 hour) training "retreat" day either at Digital Deployment or on-site.
Deliverables: Your new site in its "sandbox" (pre-launch) form, ready for your team to begin content curation with our support.

5   Launch

Intention: to plan for and later celebrate the launch of your website.

- Last QA left to right content and theme reviews, and accessibility checks
- Double check site settings, launch readiness
- Help client change DNS settings to take the new sandbox live

Key meetings: None in person, available with technical information (via messages) when needed..
Deliverables: the smooth launch of a website you can be proud of.

Technology

Powerful features that put you in control

Post once, display many ways
- Any piece of content can be "tagged" to multiple areas, yet there is only one master (making updating and syncing changes a breeze)
- Profiles can be leveraged in two way relationships, allowing contact information to be updated in one place, but visible in many areas

Content interface
- "WYSIWYG" editor makes formatting content easy
- Bulk image and file uploading with mobile-friendly photo gallery capability
- Embed YouTube videos by simply pasting the URL of the video
- Ability to embed HTML and widgets directly into site content
- Simply add event dates to any post and it appears in the sitewide calendar
- Basic translation plugins (Google Translate) and advanced translation capability

Access control and distributed administration of content
- Content dashboard with email notifications and one-click workflow approvals
- Ability to control access to navigation terms and individual posts based on role
- Ability for contributors to add content, administrators to approve before it goes live
- Revisions saved for all versions of content, and content can be reverted if necessary

Bundle & Blast® and social media features
- Any piece of content on the site can be email blasted out to your list with one click
- Multiple pieces of content can be bundled together to build newsletters with automatic TOC
- Commenting and/or Facebook integration; visitors can share or like content directly from the site
- Administrators can post content directly to Twitter or Facebook from within the website

Responsive web design
- Responsive capability built-in for visitors using any device
- Multiple breakpoints included for maximum versatility

Webforms and polls
- Easily create Survey-Monkey™-type forms to capture information from visitors
- Results can be emailed, viewed and analyzed on-site, and downloaded to Excel
- CAPTCHA discourages spamming
- Webforms can be used for site-wide contact forms and feedback forms
- Use polls to gather votes on issues and display results immediately to visitor
- Ability to send visitors to any URL or set custom confirmation pages for both webforms and polls

Other features
- Custom URLs and automatic "pretty" URLs created from post titles and navigation terms
- Advanced SEO capabilities, such as ability to set type-specific, or post-specific metadata
- Advanced search with ability to filter by attributes like type, date, author

For a complete list of functionality along with images and examples, please see
digitaldeployment.com/deliverables

Demo strongly recommended

We hope that every decision maker will allow us to give you a customized demo tailored to your needs—the usability and power are much easier to see in action!
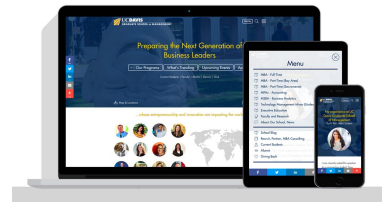
An open source platform extended for usability

We've designed our technology to give you the most powerful and flexible platform possible. Drupal is the #1 open-source enterprise content management system, widely used on sites like whitehouse.gov.

The main drawback to Drupal is that is has the reputation of being complicated compared to Wordpress and other platforms. This has less to do with Drupal as a platform and more to do with how it is configured. Its power and complexity are the inspiration behind our modules to aid in configuration and workflow for you—the site administrator—and it has even inspired our engineers to contribute to the core of Drupal 8. As a result, you will have a site that is more powerful than Wordpress and even easier to use. It also gives us more power to tailor it specifically for your needs.

Continuous evolution

As we develop new sites, we often refine functionality or add new ways of solving problems. We make each new solution available to our other clients that have a similar need. For example, we recently developed a mobile-friendly calendar solution for the University of California, Davis (gsm.ucdavis.edu/calendar) and now that mobile-friendly calendar is the new standard, and existing clients may choose to upgrade at no additional charge. Centralizing development gives us the ability to spend more money and time on a problem than any one client could afford to spend, and develop better and more refined features that can be provided on one-off CMS installations. Most reasonable website providers might not spend 10 hours to fix a small but annoying bug on your site, but we will, because it potentially affects hundreds of others.

Monthly Updates: Updates are released each month, except security updates which are released immediately. To get a sense of the cool features we release, see our release notes at digitaldeployment.com/releases.

Compliant with the most rigorous standards

Just as buildings need to have wheelchair ramps, modern websites must comply with various accessibility and web standards. We are committed to helping you make your website accessible. We adhere to W3C web standards as well as WCAG 2.0 AA, the new Section 508 accessibility standards of the U.S. Rehabilitation Act.

Mobile-ready and fast

We employ multi-breakpoint responsive themes so your design will look good on any device. We also guarantee your site's readiness for events like "mobilegeddon" — the day Google started penalizing sites that were not mobile-friendly. Future penalties are expected for sites that load slowly and that do not use SSL (https), and we are constantly evolving the platform to meet such technical requirements before they are enforced.

Hosting

Digital Deployment has created a powerful hosting environment specifically tailored to its technology. It uses multiple providers and data centers to ensure speed and uptime. We guarantee 99.95% uptime, seamless monthly updates, and fast operation.

HTTPS (SSL) included: HTTPS—commonly referred to as SSL—is the industry standard protocol for secure communication between a web server and a browser, allowing users to trust the web server they are connecting to and ensuring all data remains private and unchanged in transit. Full HTTPS configuration (including SSL certificate acquisition, issuance, renewal, and installation) is included with your hosting environment. Digital Deployment uses the Let's Encrypt certificate authority sponsored by Cisco, Google, and Facebook and uses only modern encryption standards, such as the TLS 1.2 protocol with SNI, AES ciphers, and 2048-bit keys.

Full specs for the IT-minded: For a comprehensive overview of the hosting environment, uptime guarantees, hardware configuration, and security practices, please visit digitaldeployment.com/hostingspecs.

Backup hosting arrangement

Digital Deployment can, upon request, establish an independent secondary provider for hosting and basic maintenance that the client can switch over to at any time for any reason. We have established this protocol with larger clients including universities who host their entire website on DD infrastructure. It will provide uninterrupted service and the ability to immediately establish a reasonable service contract directly with your organization in the unlikely event that Digital Deployment becomes insolvent or unresponsive.

Your right to choose

We have designed our platform to protect you in the event that you need to move away from Digital Deployment. Because Drupal itself is portable and widely used, you can always choose to host elsewhere. And because every part of the software and theme is designed to Drupal specifications, it could be maintained by others familiar with the platform. Your service agreement is month to month, allowing you to cancel anytime. We believe it is our duty to provide value to you, and if we're not, we'll honor your right to have a reasonable exit plan.

Support

Although our clients publish their own content without assistance, it's helpful to have an ongoing relationship with Digital Deployment to provide high-assurance support, security patches and updates, offer ongoing training, section 508 accessibility support, and refresh your site with new features and the latest technology. To aid our clients, we have developed a Service-Level Agreement program (SLA) which makes this expertise affordable and available for a flat monthly fee.

Because of the platform and SLA program, more than **95% of the clients who joined five years ago are still active clients today**.

What's included in the Service Level Agreement

Whether you need help thinking through a new landing page, training a new staff person, or need a guaranteed less-than-30-minute response to an urgent issue 24/7—our comprehensive support program ensures you get help from the same Sacramento-based team that built your website.

Hosting	**Security**	**Upgrades**
An enterprise high-availability hosting environment consisting of unlimited storage, off-site backups, 24/7 monitoring	Constant monitoring and immediate patching of any detected vulnerability or malicious script	Major new features such as SSL and upgrade to the latest stable version of Drupal as well as minor enhancements and bugfixes
Support	**Training**	**Strategic reviews**
Timely and comprehensive support for any issues you encounter with your site.	Help train new staff members or get an quarterly refresher and review, available in-person or remotely.	In-depth analysis of your site, fit-and-finish, content quality, and help with any problem sections.
Consulting	**Accessibility**	**Insurance**
Strategic support for your organization's broader goals, including redesigns	Helping you meet evolving standards from Section 508 to WCAG 2.0 AA	$1,000,000+ of liability coverage for data loss, theft, and security issues

Full details of the SLA program can be found at digitaldeployment.com/sla.

Guaranteed response times

When you have an issue, you can submit a ticket directly through your website or through support.digitaldeployment.com. We guarantee a response and resolution time depending on the priority that you set on each ticket. We take this seriously: 99% of all tickets submitted are responded to and resolved within the defined timeframes.

If you set your priority to	You'll get a response within	You'll have resolution to your issue within
Low	2 days	2 weeks
Medium	8 hours	1 week
High	2 hours	1 day
Urgent	30 minutes	2 hours
Emergency	Immediately	ASAP

Documentation and knowledge base

Got a question while you're up late working and don't want to bother anyone? Our knowledge base has hundreds of step-by-step articles on everything from how to filter out your own office traffic from Google Analytics reports to changing landing page templates to adding/deleting users. Every aspect of your site's operation is thoroughly documented and updated with each monthly release. Check out some articles at support.digitaldeployment.com.

Company

Since our founding in 2004, our people have been our greatest asset. By supporting the passions of our team and investing heavily in leadership and professional development, we have enjoyed a profound employee retention rate—in fact, no employee has ever chosen to leave Digital Deployment to work somewhere else. For our clients, this means extraordinary operational continuity, deeper institutional memory, and an emphasis on productive long-term relationships. We have been named the #1 Best Place to Work and Healthiest Employer by the Sacramento Business Journal.

Leadership

Company

Operations

Client Services

Mac Clemmens
As CEO, Mac stands for quality, customer satisfaction and thoughtful growth. Mac is involved throughout the development process to provide strategic guidance.

Mac founded DD while in college and led its growth to a multi-million dollar enterprise. He wants to improve computer science education and has been invited to the White House three times to work on small business and net neutrality policy. Mac was named 40 Under 40 in 2016 by the Sacramento Business Journal.

Learn more about Mac:
digitaldeployment.com/mac

Sloane Dell'Orto
As COO, Sloane oversees operating rhythms. She is the architect of our current process and offering.

Sloane was DD's first employee and has a marketing background. Prior to joining, she worked as the Director of Marketing for Quest, where revenue increased 5x to 100M during her tenure, and she operated her own web development firm.

Learn more about Sloane:
digitaldeployment.com/sloane

Kristy Prince
Kristy leads Digital Deployment's production arm. Her passion for client success is nurtured by her drive to deeply understand complex online challenges, and how Digital Deployment's services and platform can solve them.

Prior to joining Digital Deployment, Kristy led the Program Management function at Ancestry.com & AncestryDNA.

Learn more about Kristy:
digitaldeployment.com/kristy

Your Team

The specific team that will work on your website redesign has a broad array of skills and is deeply experienced.

Your project manager

Amanda Benevento
Amanda is your primary point of contact for day-to-day communications. She is responsible for the allocation of resources, scheduling of meetings, and an on-time and on-budget delivery.

Prior to joining Digital Deployment, Amanda worked at Google as the project manager of their Global Media Lab, managing the launch of the Pixel and Pixel 2.

Learn more about Amanda: digitaldeployment.com/amanda

Your strategist

Lindsay Hardy
Lindsay's job is to make sure your site technically meets your needs, looks great, and works well for your users. Lindsay will be present at all key points of the project.

Lindsay worked for five years directing web strategy at UC Davis before joining DD. If you look at gsm.ucdavis.edu, you will see his work end-to-end, as he was responsible for content and all aspects of design.

Learn more about Lindsay: digitaldeployment.com/lindsay

Your business partner

Rocky Martin
As the person who coordinated this proposal, Rocky is committed to your satisfaction and is always available if you have any questions.

Since joining DD, Rocky has successfully managed contracts that have led to over 100 successful website launches by ensuring our clients are happy and requirements are understood and clearly scoped in advance.

Learn more about Rocky: digitaldeployment.com/rocky

Your tech lead

Jason McWhorter
Once you've approved your design, Jason will bring that design to life. Jason is our lead frontend developer, making our client websites look spectacular and always keeping up with the cool new things in our industry.

Jason has been with DD for over seven years. His first project here was designing Google's exhibit at the Smithsonian.

Learn more about Jason:
digitaldeployment.com/jason

Your content strategist

Steph Bradley
Steph will be your lead content strategist, she will perform an audit of your current content and produce a plan to migrate and enhance the overall content to align with your new website design. She will also provide best practices and training.

Steph has championed content for our largest sites, including the Southern Regional Education Board, Long Beach Community College, and Carmel by the Sea.

Learn more about Steph:
digitaldeployment.com/steph

Your design lead

Maria Meehan
Maria will be your dedicated design lead. She partners with our web strategist to produce compelling designs that have a and a 'wow' factor, but most importantly meet your user's needs.

Maria has over 10 years of design experience at top agencies prior to working with DD.

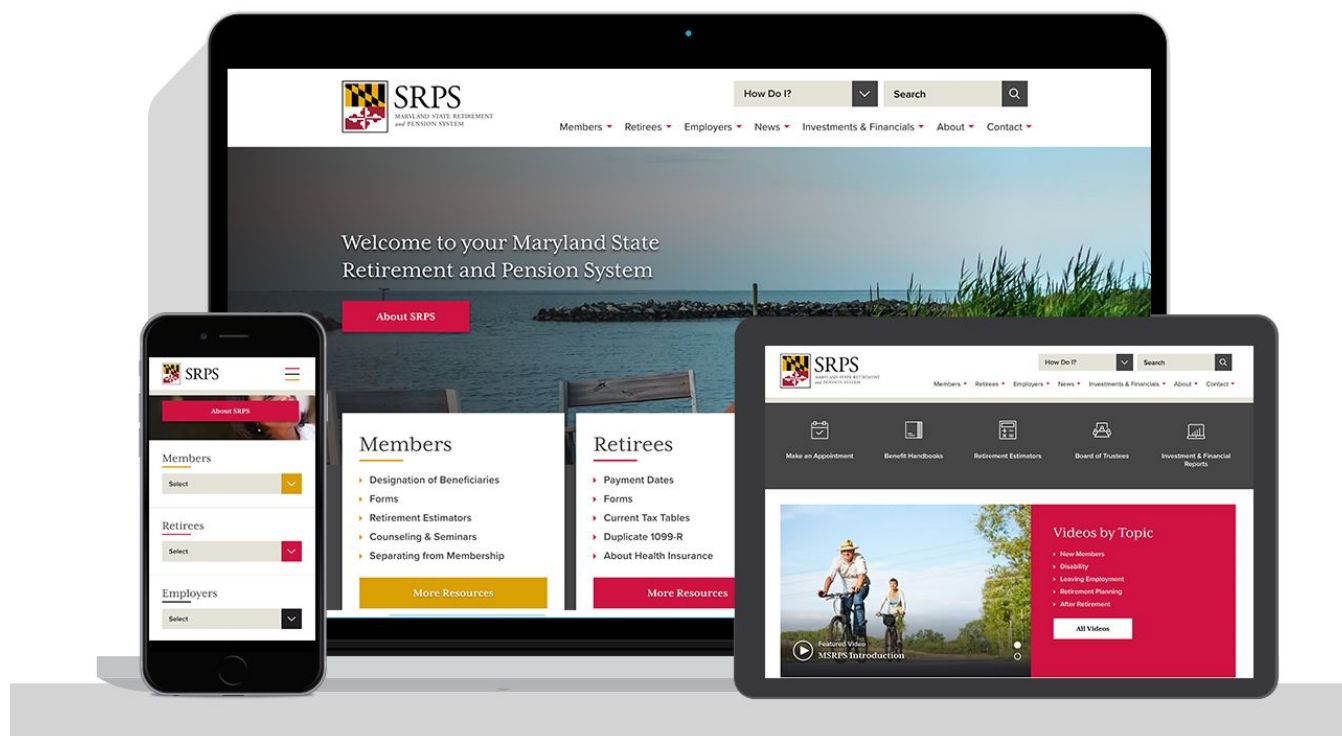Learn more about Maria:
digitaldeployment.com/maria

References

We are happy to provide more detail on any of the projects we have built over the years—we love to share our work! In the interest of brevity, however, here are a few recent, relevant clients:


www.sra.maryland.gov

- A groundbreaking design informed by data and real customer feedback is now helping the **Maryland State Retirement and Pension System** to proactively answer top member questions and empower members to self-serve.
- As part of the process, Digital Deployment integrated with multiple retirement estimators, created an accessible and mobile responsive design, and created a workflow structure which allows content creation to take place in different departments.
- Since launch the site has already seen an 11% boost in visits via organic search and these visitors are spending 30% more time on the site.

Reference:

Ira Greenstein Chief Information Systems Officer, igreenstein@sra.state.md.us, (410)-625-5547

www.scers.org
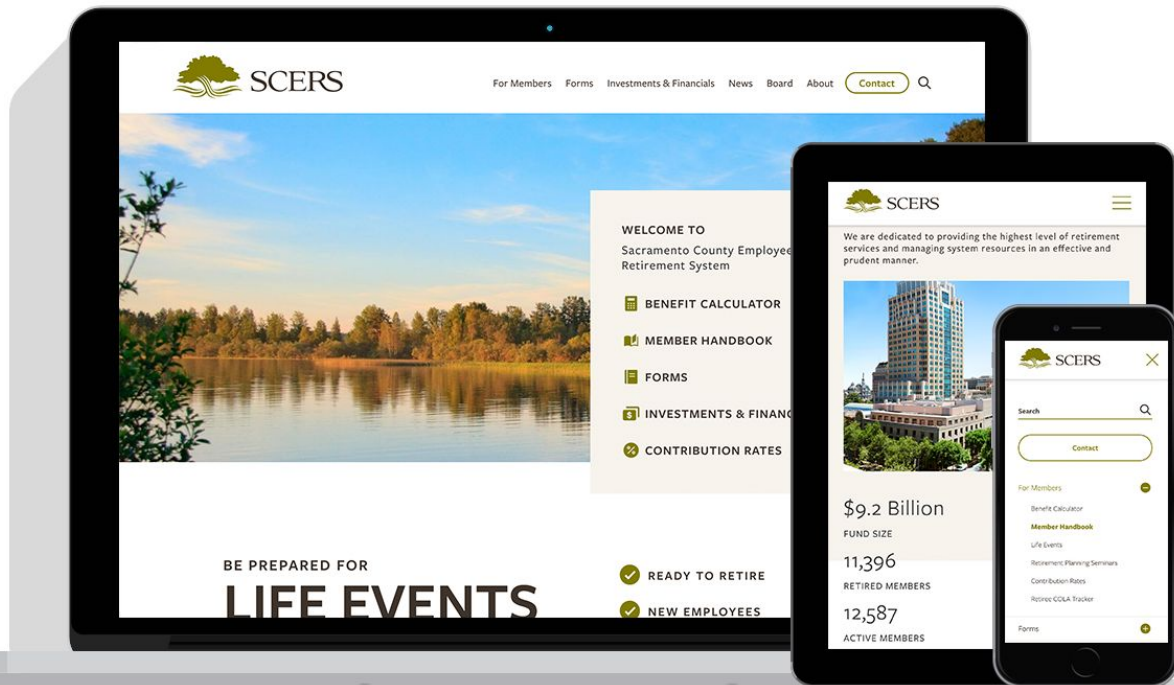
- The **Sacramento Employees' Retirement System** partnered with Digital Deployment to create a website that proactively guides members in their retirement choices, makes it easy to locate and utilize key forms, helps membership and their families to navigate important life events (birth, divorce, death, etc.), keeps audiences informed about key information, and makes it easy to find outstanding customer service.
- We created a mobile first, ADA compliant, and responsive design that quickly allowed members to self select to their area of interest. We also focused heavily on member education and spent a lot time with online forms and publications in order to make them easy to find and utilize so members are empowered to self-serve. We also provided an excellent search tool so visitors can search for key content and forms on the site. Finally, SCERS is using our newsletter tool to help all audiences stay informed about news, events, updates, board
- Now that the site is launched, we working with SCERS to build an intranet.

Reference:
John Lindley, Sr. IT Analyst, LindleyJ@saccounty.net, (916) 874-7806

www.vcera.org
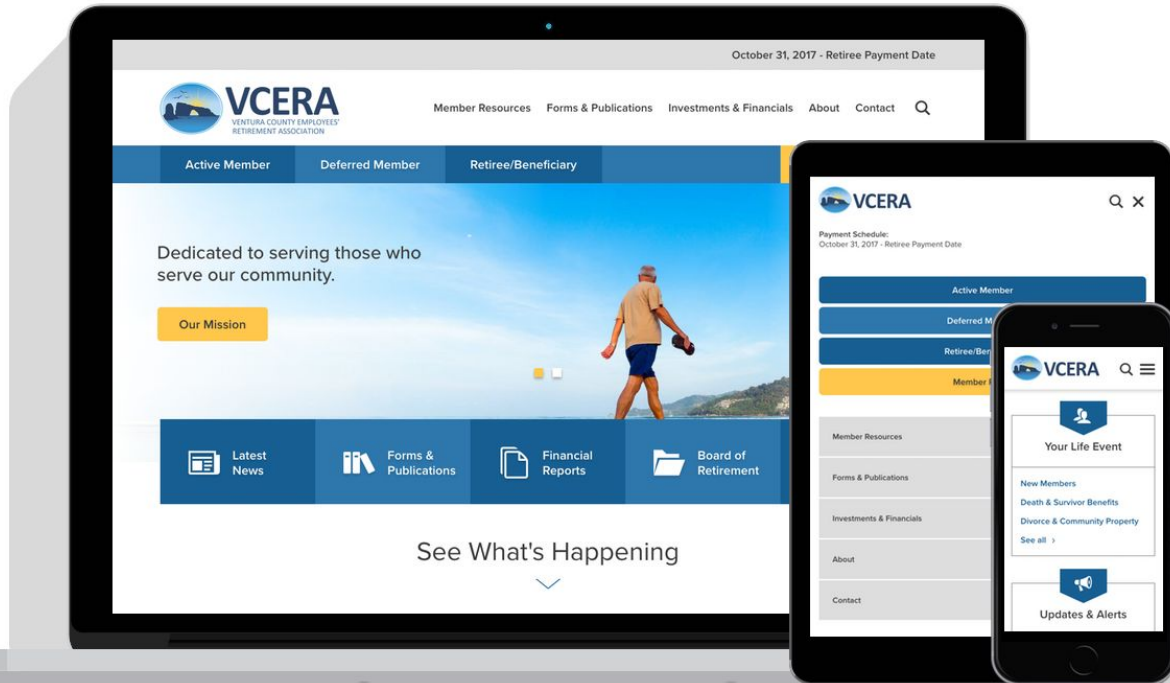
- The **Ventura County Employees' Retirement Association** had the unique challenge of breaking out of the county's website and creating a new identity for themselves.
- Our team assisted with a rebranding effort and securing a new domain, on top of restructuring the information architecture, creating a responsive design that was "calming" yet could easily be navigated, and implementing a CMS.
- The goal was to educate members at all stages of their careers about their pension options, (Just starting out, mid-career, planning retirement) such that they could discover relevant resources tailored to their needs.

Reference: Linda Webb, Retirement Administrator, linda.webb@ventura.org, (805) 339-4250
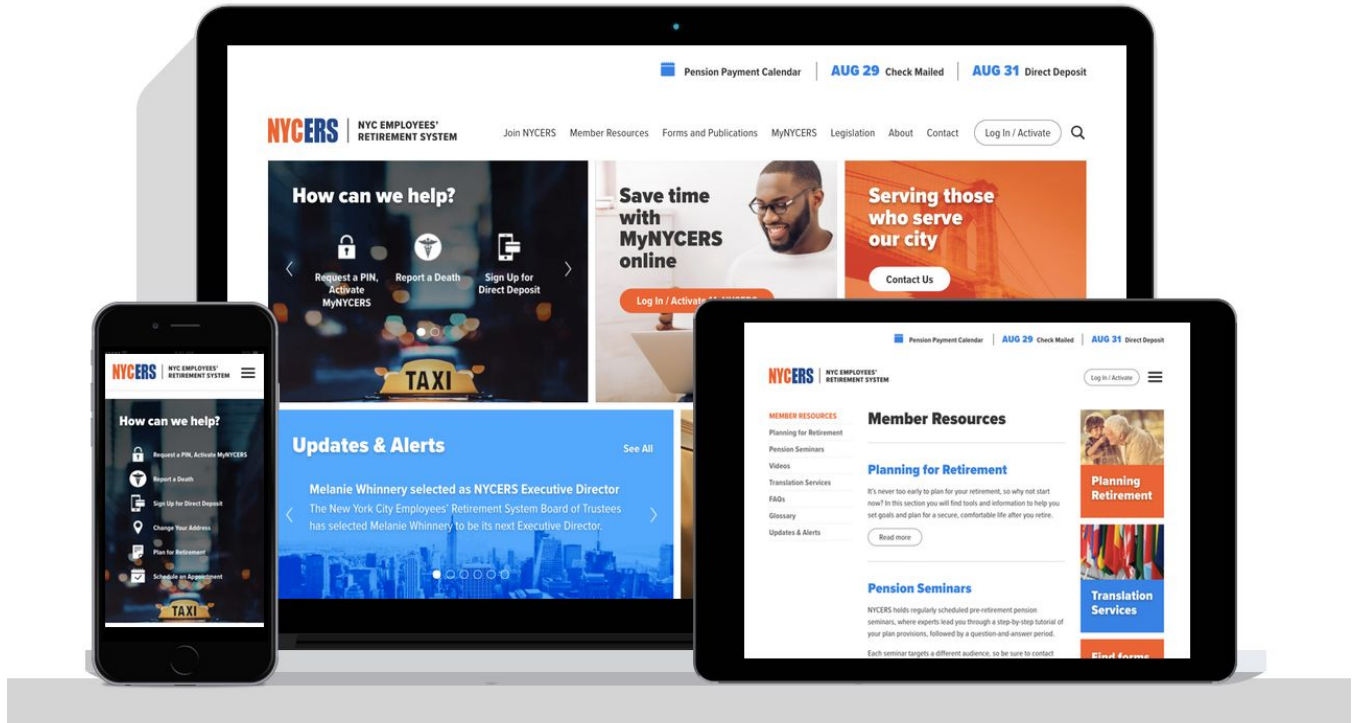
- We worked with the **New York City Employees' Retirement System** to create a clean, responsive, disability-friendly, and uniquely New York design that works well on all devices for all age groups.
- Our team restructured the information architecture so that each type of user can find what they need efficiently and Integrate search across the website and its pdfs for quick discovery of specific information
- The goal is to educate members at all stages of their careers about their pension options. (Just starting out, mid-career, planning retirement) such that they could self-identify to discover relevant guides and resources tailored to their needs.

Reference:
Regina Kahney, Director, Communications Division, rkahney@nycers.org, (347) 643-3476

Additional references
You can see more of our work at digitaldeployment.com/portfolio, and we would be happy to connect you with any of our other clients.

Pricing

Estimated Timeline	Process Milestones	Hours	Cost
Weeks 1 - 2	Orientation - Project participants enrolled and instructed in the 5 Phase process. Discussion, documentation, and preparation, planning and resource allocation for Phase 1.	44	$ 6,600
	Infrastructure deployment of testing and production environments, Hosting setup and configuration, CDN, Virtual Private Cloud, Server setup, Load Balancer Configuration, Webserver Config, Apache Solr, Drupal installation, module deployment, configuration of content types, taxonomy, and all other necessary modules.	132	$ 19,800
Weeks 2 - 5	**Phase 1:** Discovery - Develop and disseminate exploration exercises. Develop and disseminate stakeholder surveys. Meet and collaborate on Information Architecture (IA), Sitemap, Content Strategy, adjust accordingly.	132	$ 19,800
	First Process Payment		**$ 46,200**
Weeks 5 - 10	**Phase 2:** Design - design discussion meeting, designs presented, design revisions, final design approval. Platform and SLA agreement begins.	176	$ 26,400
	Second Process Payment		**$ 26,400**
Weeks 10 - 15	**Phase 3:** Implementation - Execute design and information architecture into the CMS. Implement templates.	264	$ 39,600
Weeks 15 - 21	**Phase 4:** Sandbox training and support, launch and post-launch support planning. Quality testing and review, QC, fit-and-finish adjustments.	132	$ 19,800
	Third Process Payment		**$ 59,400**
	Migration services, including migration, evaluation, quality control, formatting, and metadata. Our Crawler found 1000 primary pages and 500 files (Cost formula: 12 pages per hour, 24 files per hour, $150/hour) * Primary Pages combine all valid and indexable pages which are either unique, or primary versions of any duplicate set. Best portrayal of what will be indexed by Google.	104	$ 15,625
Weeks 21 - 22	**Phase 5:** Launch - Final quality checks and preparation for launch, DNS support, soft launch, final launch.	22	$ 3,300
	Final Process Payment		**$ 18,925**
	Total Implementation Cost	1,006	**$ 150,925**
	Monthly Service Level Agreement Fee		$ 1,600
	Estimated Launch Date based on a 6/1/2019 start date		**1/31/2020**

Terms

Contract

All we need is this signature page of this proposal scanned and emailed to sales@digitaldeployment.com to get started. However, if a separate, formal contract is required by your organization, no problem! If you have a standard contract we are happy to use yours; just reference this proposal as the list of deliverables, state that the contract supersedes this proposal in the event of a conflict, and our legal team will review and submit any questions. We can also send over a sample contract for you to use. Note that we do not require anything other than this signed proposal to begin work, and we will use the terms of our service level agreement (SLA) for ongoing maintenance by default. Details of the service level agreement can be found at digitaldeployment.com/sla.

Timeline

The project timeline is typically between six to eight months from contract execution to launch, and varies based upon your needs and the availability of your team.

Payments

Project pricing is a flat fee; the platform and ongoing support (Service Level Agreement) program is month-to-month and begins after design is approved. There is no contract required for the platform and SLA program and you can cancel at any time.

- Project is not to exceed **$150,925**.
- Payments are made at four key milestones: after Phases 1, 2, 4, and before site launch.
- Ongoing platform and support (SLA program) is **$1,600/mo.**

Acceptance: I wish to execute this website development agreement to provide the deliverables outlined in this proposal.

Signature: _____   Signature: _____

Print name: _____   Mac Clemmens, CEO

Date: _____   Date: _____

Appendix A:

Data Security, Business Continuity and Hosting Infrastructure Questions

Digital Deployment has partnered with Pantheon to provide a world-class, full-service hosting infrastructure. Pantheon hosts Harvard.edu, Patagonia, the World Bank, and over 285,000 of the nation's largest websites. Pantheon has an outstanding reputation for reliability and performance, and it also has specialized experience with open-source content management systems.

Together, our unique infrastructure and security capabilities give our customers the peace of mind they need to deliver awesome, secure, and reliable online experiences.

You may view a comprehensive overview of our Pantheon-powered hosting infrastructure at digitaldeployment.com/hostingspecs / View press release / Watch webinar

Security Questions: Security Basics
- Do you have in-house IT technical and security staff for your hosted data centers or is the personnel outsourced? If outsourced, what is the average response time for incidents and outages? We have in-house IT staff that is responsible for the on-going maintenance of platform. Our lead software engineer is responsible for the security of the platform and reviews all code changes. Our hosting partner is responsible for all security related matters with the hosting environment and protects against things like a denial of service attack. Clients set parameters for incident response times by the level of ticket they submit. Our average response time for urgent tickets and/or outages is 3 minutes and 21 seconds.
- Do you conduct background checks on employees, contractors and consultants with access to the client's data and the hosts said client's data resides on? All employees are subject to a background check as part of the hiring process. All consultants that maintain any critical infrastructure or secure applications conduct background checks on their employees and are required to maintain their own insurance.
- Do you conduct annual mandatory security awareness training for all users of your network? Yes, we have an information security questionnaire that is performed on a regular basis in order to meet our insurance requirements.
- What type of security monitoring do you have in place? We have comprehensive full-stack security monitoring for network status, server and CPU monitoring, stability for the application itself, and uptime monitoring.
- What is your policy for auditing your networks internally and externally for known and unknown vulnerabilities? What is your remediation policy when vulnerabilities are discovered? Do you notify clients of known security vulnerabilities? Our hosting partner regularly performs a number

of scans to maintain the security of the hosting environment. We always fix identified security issues within 24 hours and notify clients immediately of any known security vulnerability.
- Does your infrastructure reside solely in the United States? Do you have components or services that reside outside the United States? Yes, our infrastructure resides solely in the US. The only exception would be our CDN (content delivery networks) and other services that help serve and mirror public content to other parts of the world quickly.

Security Questions: Data Security
- What data encryptions and security protocols do you use to enable clients to provide their data? Please describe the process, noting your security protocols, for how data is uploaded and transferred from your clients to you, and how it is eventually stored on your system(s). Because we work on publicly facing websites and do not host PCI or PII content, encryption is not necessary. We do use https for all site communications to keep them free from interference and eavesdropping, and we do scan for malicious scripts within the CMS.
- Is client data backed up? And if so, where are the backups located in relation to the original data? How is the backup data transferred? Who has access to the data? Backups can be automated or triggered manually. Each backup, containing all site-related customer data, is shipped to cloud storage as a compressed archive. Backups are encrypted during transfer and at-rest with appropriate corresponding 256-bit Advanced Encryption Standard cipher modes, storing private keys and encrypted backup data on separate servers. Users have the ability to test restoration via the dashboard for any site for any manual or scheduled backup. They also have the ability to restore from a backup to a new site, on Pantheon or elsewhere. By default, only our developers and Pantheon engineers have access to backups.
- How is client data segregated from other client data? Pantheon is built on a container-based cloud architecture. Unlike deployment of clusters or virtual private servers, containers allow lightweight partitioning of an operating system into isolated spaces where applications can safely run. Each website runs within its own container, so client data is completely isolated even at an operating system level.
- How long is client data stored? What is your retention policy for client data? Client data, including backups are stored in perpetuity, except when forbidden by GDPR and other applicable laws.
- What type of physical and logical controls on access to data do you employ? Our hosting environment is SOC 2 certified and follows all the appropriate protocols.
- If a client's contract with you expires or if a client terminates their contract with you, is their data destroyed or returned to the client? The client data is maintained in backup archives unless the client requests it to be destroyed.
- If data is purged or destroyed, how is this done, what technologies are used, and what certifications do you provide to "prove" that a client's data has been removed and no longer resides with you and/or can be accessed by anyone? N/A since the data is for public-facing websites and does not contain PCI or PII.
- What Data Security Regulation(s) do you follow and adhere to? What Security Policies do you have in place? In addition to the following the recommended practices by the Drupal Community, our Pantheon-powered infrastructure is regularly reviewed by third parties to verify platform security, privacy, and compliance—and we are constantly working to widen this coverage. Learn more about Pantheon's conformity with the following information security policies and certifications:

- SOC 2: SOC 2 compliance provides third party assurance to our customers about the adequacy of Pantheon's information security system. Our SOC 2 compliance covers the Security and Availability Trust Services Criteria.
- GDPR: The General Data Protection Regulation (GDPR) is a data privacy law that defines a framework for how companies use and protect personal information about European Union citizens. Pantheon complies with all applicable data privacy laws including GDPR.
- FERPA: The Family Educational Rights and Privacy Act (FERPA) is a federal law that protects the privacy of student education records. Pantheon's security policies and infrastructure allow customers to be FERPA compliant.
- EU-US & US-Swiss Privacy Shield: Pantheon complies with the requirements of the EU-US & US-Swiss Privacy Shield frameworks on data privacy. We recently expanded our Privacy Shield coverage to accommodate the United Kingdom's withdrawl from the European Union. To learn more about these programs and to view Pantheon's Privacy Shield registration, please visit privacyshield.gov.
- What Notification procedures do you have in place? If a suspected data breach has occurred, how soon to do notify clients? We notify clients within 10 minutes of any outage or critical security issue. Our current response time for urgent tickets is 3 minutes and 21 seconds.
- Are clients (or their representatives) permitted to perform onsite due diligence on the data center containing their data? No, our hosting partner is the only one with access to our servers.
- How do you conduct and assess physical security? Pantheon's primary datacenters are managed by Google. Google data centers feature a layered security model, including safeguards like custom-designed electronic access cards, alarms, vehicle access barriers, perimeter fencing, metal detectors, and biometrics. The data center floor features laser beam intrusion detection.
- Do you have cyber-security insurance? If so, how much? Yes, for $2 million. We can provide a certificate of additional insured upon request.

Business Continuity and Disaster Recovery
- Do you have a Business Continuity Disaster Recovery plan for the products and services we would receive from you? How often is it reviewed? How often is it updated? How often is it tested? It is constantly reviewed and updated and periodically tested. Please see hosting specs
- Does your Business Continuity Disaster Recovery plan address loss of technology, loss of resources, loss of facilities, and loss of one of your vendors. Yes, it covers all of these scenarios.
- What strategies have you put in place in order to respond to the loss of critical resources for the products and/or services your clients receive from you? How do you communicate to your clients if there is a disruption of service? We have two hosting vendors and can switch between the two at any time.
- What is your recovery time objective for the resources for the products and/or services your clients receive from you? The recovery time depends entirely on the type of disaster that occurs. Distributed denial of service attack recovery would be instantaneous. Hardware outages should not affect anything because we have redundant hardware and a high availability hosting environment.
- Do you evaluate your vendors' preparedness as part of your business continuity or risk management functions? Yes, our vendors and an imperative part of our business continuity.
- In the past 12 months, have you conducted an employee Business Continuity/Disaster Recovery training exercise of the systems needed to provide your product and/or services? If so, can you

share the results? Is your organization able to operate effectively when key locations are closed? Please see [hosting specs](#)

- Is your organization able to operate effectively when key locations are closed? Yes, due to our redundant hardware and high availability hosting environment.
- If your service is limited due to a disruption, how will clients be prioritized? Because all clients share the same environment all clients are prioritized equally for fast recovery.
- What is your backup policy? Full backups are performed nightly and retained..

Website Hosting and Support

- Describe your hosted solution service offerings? Please see [Hosting Specs.](#)
- How much storage space do you offer?
    - By default, our client websites can scale up to:
        - 300K Monthly Visits
        - 1.5M Pages Served
        - 200GB SSD Storage
- How much bandwidth do you offer? Is there load balancing in place? Are there excessive bandwidth charges? We offer unlimited upload and 2 TB per month of download bandwidth. We do have load balancers in place and there are no excessive bandwidth charges.
- How and by whom are your servers monitored? Security alerts, electronic mailings and site traffic are monitored by live data center personnel 24/7.
- Do you provide SSL? SSL is included.
- How many customers are on each server? N/A in a containerized environment. There are a total of 285,000 websites on the infrastructure.
- Is your web portal application in house developed or a third party developed (off the shelf) application? N/A
- Is your web portal hosted within the same Data Center as the client sites? N/A
- Is there redundant connectivity to allow multiple client connections without limiting bandwidth? Yes, the Google Network has numerous redundant upstream providers, bolstered by the Fastly CDN, making it nearly impossible to overwhelm the network.
- Who is responsible for maintenance and on-going support of the web-portals? N/A
- How often are service upgrades performed to the web-portals and hosts, both in terms of software and hardware? N/A
- How often is the system down on average for system failures and scheduled repairs or updates?
- What is your downtime history? What is your average monthly uptime for the past 12 months? What are you accountable for in terms of an outage? 99.96% uptime in the last 12 months. We take full responsibility for any outage and we guarantee a minimum of 99.9% uptime. We have never dropped below this threshold in our history.
- How do you notify clients of schedule or unscheduled system maintenance? We notify clients via email. We perform service updates monthly with virtually no downtime. Clients are notified in advance of any scheduled network maintenance by email.
- Do you have a service level agreement for clients that include the level of uptime/availability with penalties for non-compliance? Our Service Level Agreement (SLA) program does include uptime/availability requirements. Please see the support section above.
- What is your technical/customer support model if clients need assistance accessing the site or encounter errors with portal functional? Do you provide after-hours support? How responsive is

your customer services and tech support? We provide 24/7 emergency support with an average of 3-4 minutes response time. We also provide standard support through our ticketing system during business hours.
- How easy is it to upscale or downscale services if needed? Scaling of resources is an automated process with no downtime due to the Pantheon container-based architecture.

Termination Provisions
- If contract is terminated, what happens to SBCERAs' data? How does SBCERA retrieve its data? What cost for professional services are involved? If you terminate your contract with us, we will provide you with a copy of the database that you can then host on internal servers or with a third party. We utilize Drupal which is open source and very portable. Providing you with a backup incurs no additional cost.

Project Kick-Off &
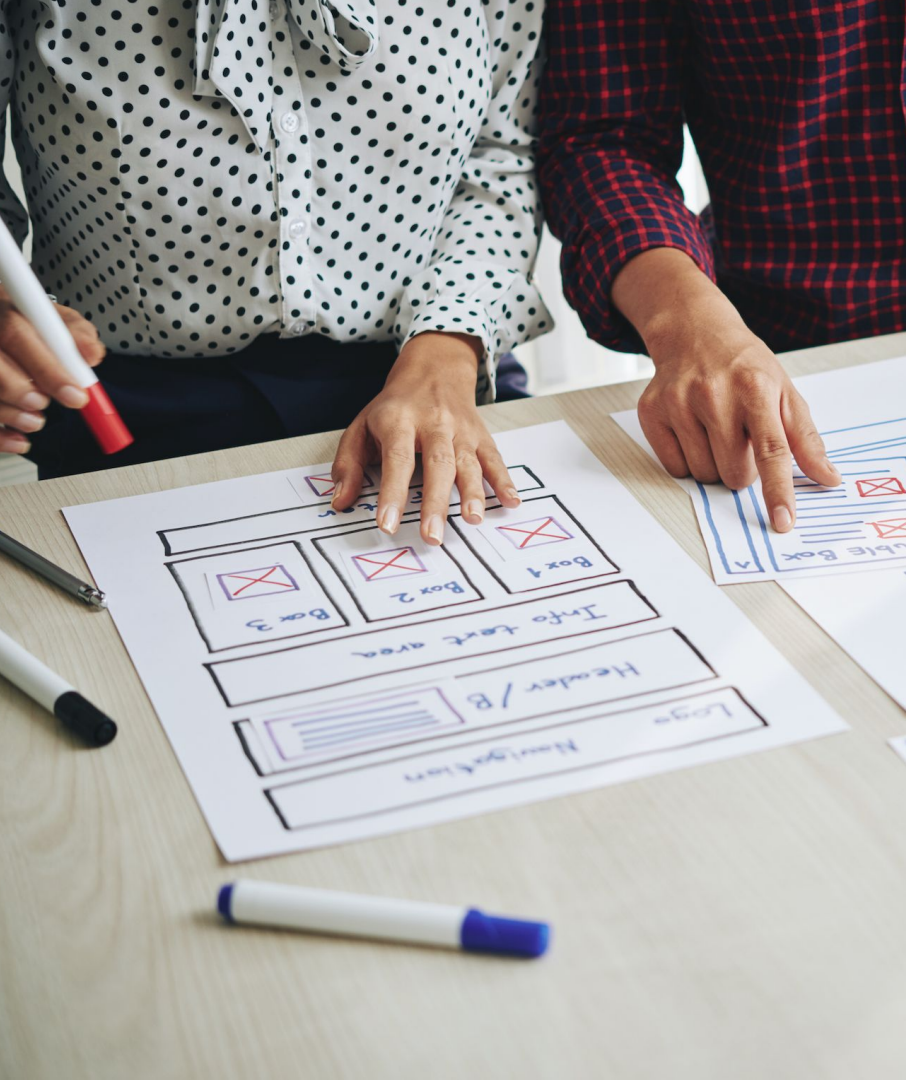
Research & Discovery

Agenda

Introductions

The Digital Deployment Team:

- Amanda Benevento - Project Manager
- Lindsay Hardy - Director of Strategy
- Kaila Ricci - Digital Strategist
- Karla Timbang - Content Specialist
- Maria Valenzuela - Graphic Designer
- Kristy Prince - VP of Client Services
- Rocky Martin - VP of Sales

The SBCERA Team:

- Please introduce yourselves

Scope of Work

Scope of work

- Technology
  - Update platform to Drupal
- Content
  - Content migration from current platform to Drupal
- Strategy
  - Perform discovery to understand organizational services, reach, and user needs
  - Update Information Architecture
- Design
  - Redesign homepage and interior pages
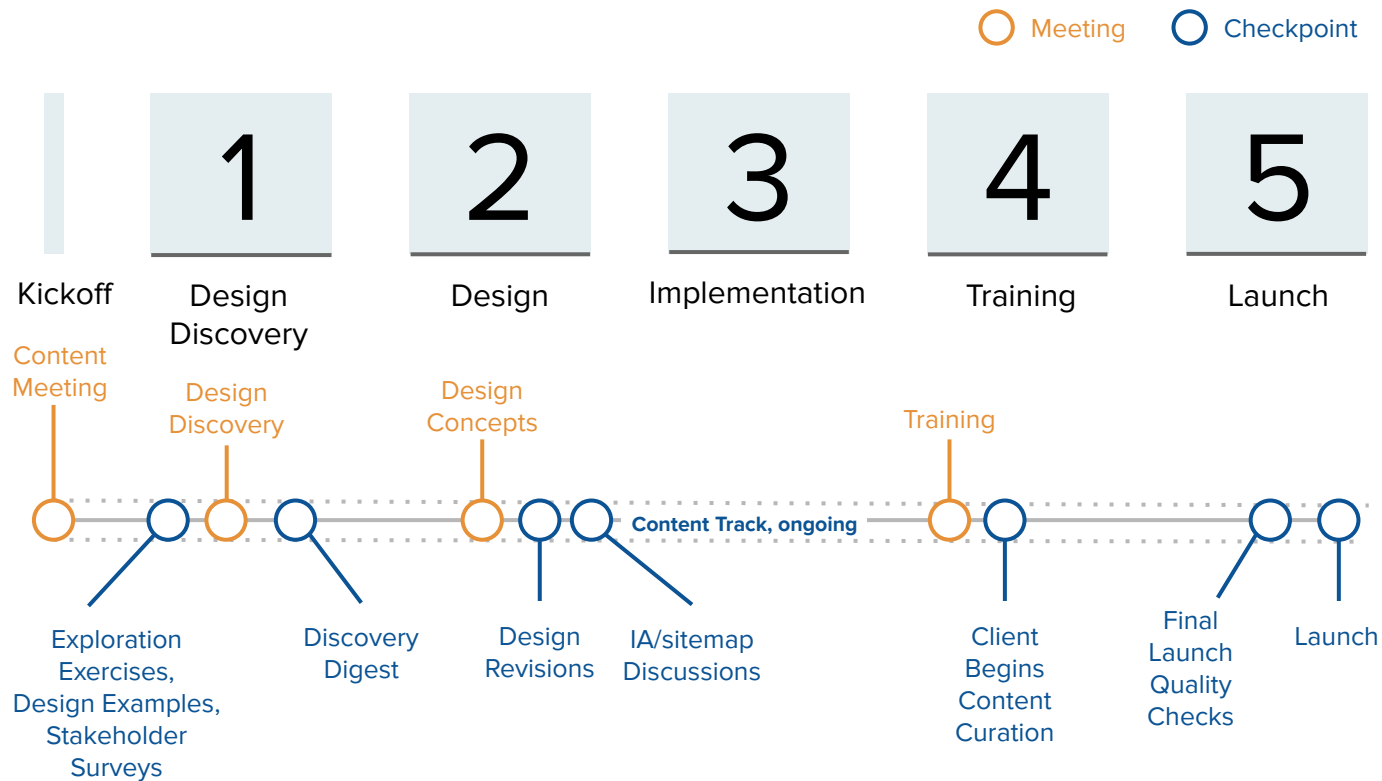 - Mobile responsive
  - Meet accessibility standards

5 PHASE PROCESS

Our approach to building the best websites.

Content Meeting

Pre-content meeting

- ► Content questionnaire
- ► Identify content leaders

Content meeting

- ► Review content questionnaire responses
- ► Goals for content

Follow up

- ► Inventory of non-standard content
- ► Migration/curation strategy
- ► Timeline

Phase 1
Design Discovery

Information gathering surveys

- ▸ Exploration exercises
- ▸ Stakeholder surveys
- ▸ Design examples

Google Analytics

Analysis of data

Discovery conversations

Discovery digest

1

Phase 2 Design

Phase 2a meeting

- Review 2 homepage sketches

Design revisions on selected design direction

Phase 2b meeting

- Review homepage revisions
- Review mobile design & interior templates

Information architecture/sitemap draft sent to client for review and feedback

Phase 3 Implementation

Theme the sandbox to look like design

- Front end developer to implement design onto sandbox site (where you'll be editing the site before you launch)

Information architecture/sitemap

- Implement feedback and apply to sandbox site (note that this is something that can be easily updated)

Content

- Working with content leaders on content strategy

Phase 4
Content Curation

Training

- ▸ Training will be customized to your needs
- ▸ Guide team on best practices for content management to create consistency throughout the website

Content

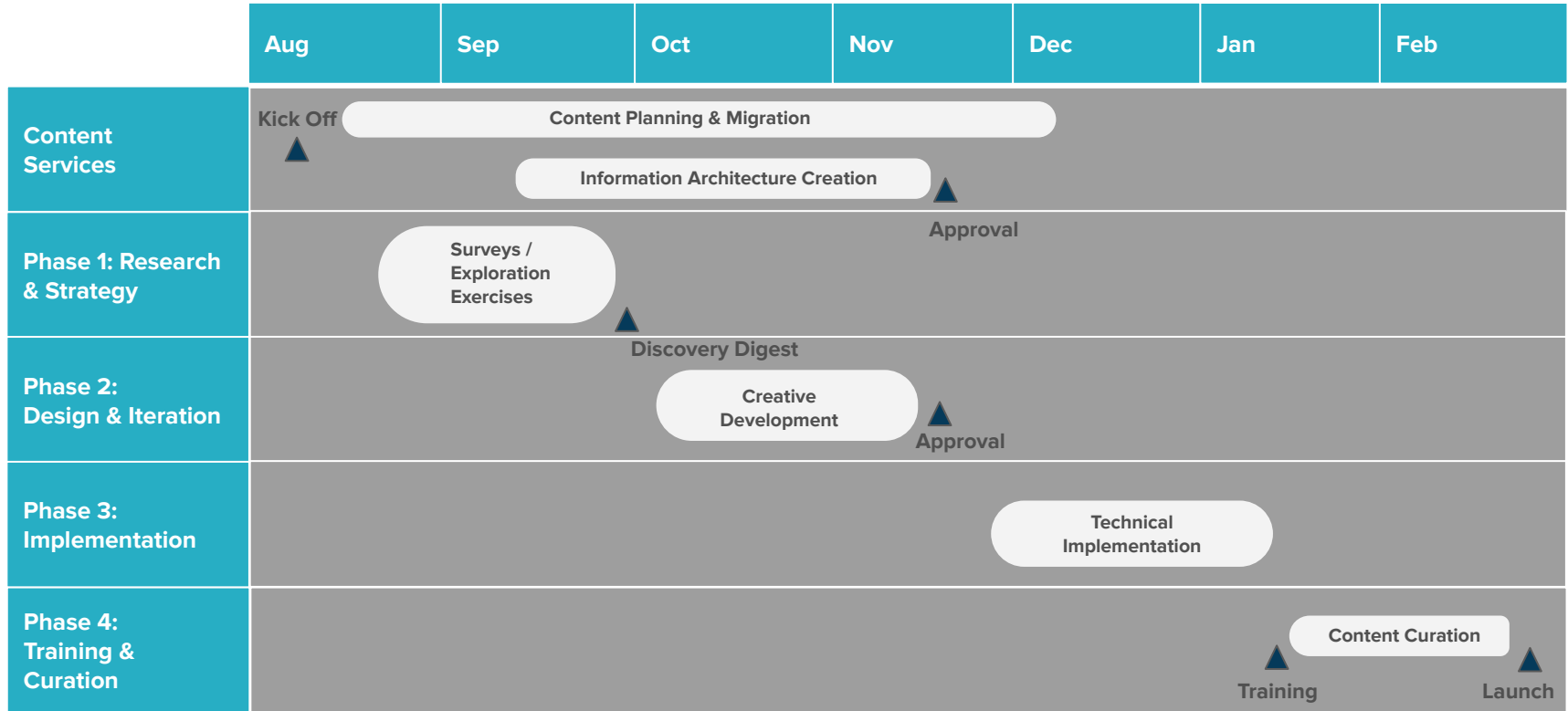- ▸ Continue to work with content leaders

Phase 5 Launch

- ▸ **Digital Deployment to do final QA checks on theme and content. Recommendations sent to client team**
- ▸ **Go live!**

Long Term Support

▶ **Support ticketing system & articles**

▶ **Monthly updates, patches, bug fixes, etc.**

▶ **Additional quarterly training**

▶ **Site QA and performance reviews**

Timeline*

	Aug	Sep	Oct	Nov	Dec	Jan	Feb
Content Services	Kick Off ▲	Content Planning & Migration					
		Information Architecture Creation ▲ Approval					
Phase 1: Research & Strategy		Surveys / Exploration Exercises ▲ Discovery Digest					
Phase 2: Design & Iteration			Creative Development ▲ Approval				
Phase 3: Implementation					Technical Implementation		
Phase 4: Training & Curation						▲ Training	Content Curation ▲ Launch

Tentative timeline, dependent on organizational schedules and/or external factors
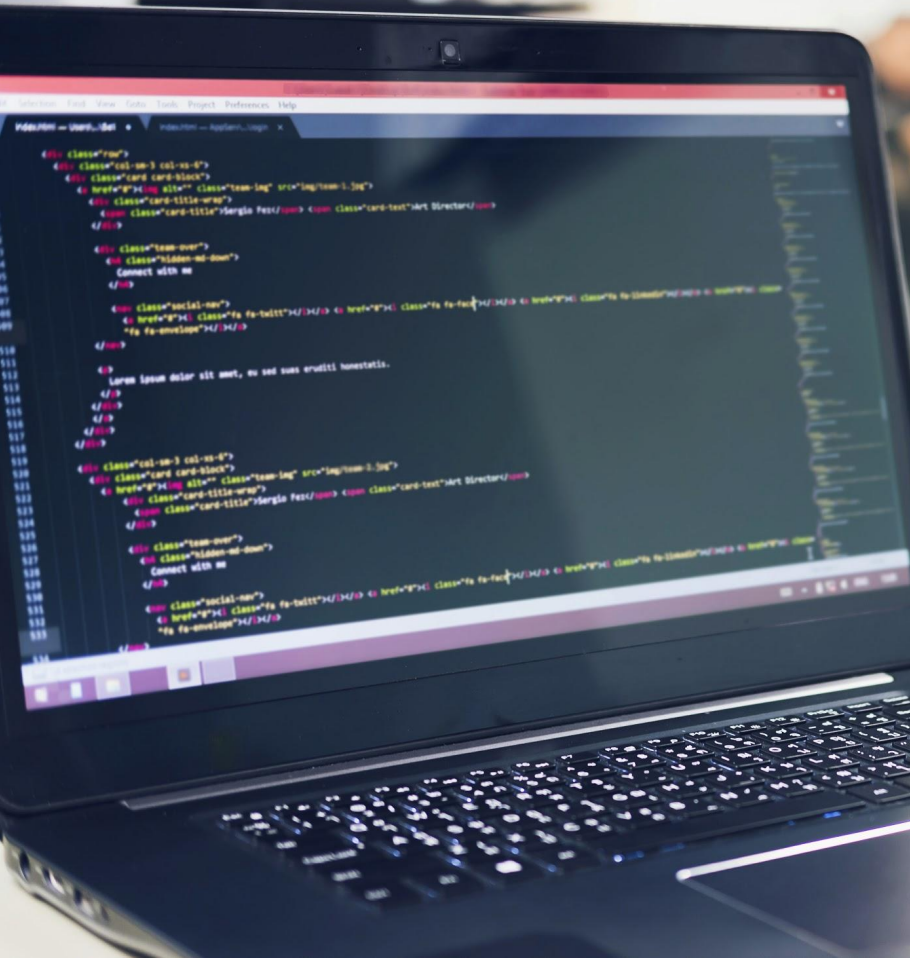
Next Steps

Next Steps

Task/meeting	Date	DD or SBCERA?
Content meeting	8/22	Both
Send Stakeholder survey draft	8/16	DD
Feedback to DD on Stakeholder survey	8/23	SBCERA
Send out Stakeholder survey	9/3	SBCERA
Schedule Phase 1 meeting	Week of 9/30	DD

Thank You

Digital Deployment is committed to creating a compelling online experience that brings your brand to life.

Thank you for your engagement!

SBCERA
Content Meeting
08/22/2019

DIGITAL DEPLOYMENT

Agenda

Introductions

5 PHASE PROCESS

Our approach to building the best websites.

5 Phase Process

○ Meeting   ○ Checkpoint

	1	2	3	4	5
Kickoff	Design Discovery	Design	Implementation	Training	Launch

Content Meeting

Design Discovery

Design Concepts

Training

Content Track, ongoing

Exploration Exercises, Design Examples, Stakeholder Surveys

Discovery Digest

Design Revisions

IA/sitemap Discussions

Client Begins Content Curation

Final Launch Quality Checks

Launch
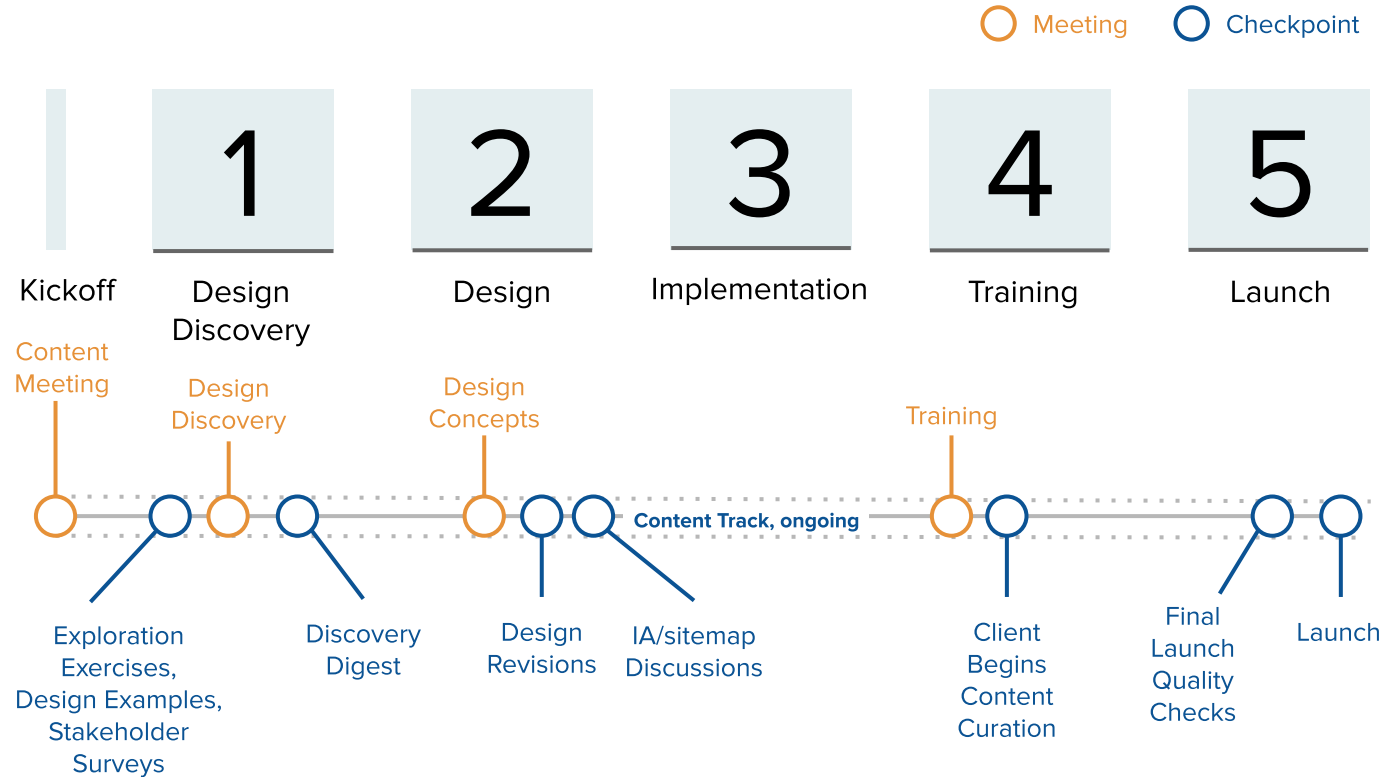
Content Services

Content Services

Content meeting

- ▸ During / around Project Kickoff
- ▸ Goal is to become familiar with content and discuss SBCERA's content leader, current and future process for site management, and content that should receive special attention

Content plan creation

- ▸ Create site inventory and analyze types of content on current site, identify potential problem areas, and create migration plan and timeline

Content Services

Content plan check-in and pre-migration tasks

- ▸ Around Phase 2
- ▸ CS summarizes content plan for SBCERA & will send over
- ▸ Anything not identified in the content plan may require additional scoping and the timeline may be adjusted
- ▸ SBCERA will complete applicable tasks discussed during content plan check-in with support from CS
  - ▹ For example, this is when SBCERA can decide what content to migrate and what we can leave behind

Content Services

Content migration

- Throughout Phases 2-3
- Manual process
  - DD migration team will manually copy & paste content from live site to sandbox
- Once we start migration, SBCERA will need to keep track of updates. If updates are made to site during migration, the SBCERA team will be ultimately responsible for making sure updates are made to the sandbox before launch.

Content Services

Training (Phase 4)

- ▶ Training will be customized to your needs
- ▶ Best practices for content management to create consistency throughout the website

Assistance during client curation (Phase 4)

- ▶ SBCERA will use skills learned during training to curate content and get site ready for launch

Content Services

Quality assurance checks (Phase 4)

- ► Communicate any content suggestions

Launch/post-launch (Phase 5)

- ► Will support SBCERA through launch, respond to tickets, and continue to communicate best practices to SBCERA when necessary
  - ▷ A month after launch, SBCERA questions will be answered by our customer success manager, who will reach out to the production team when needed
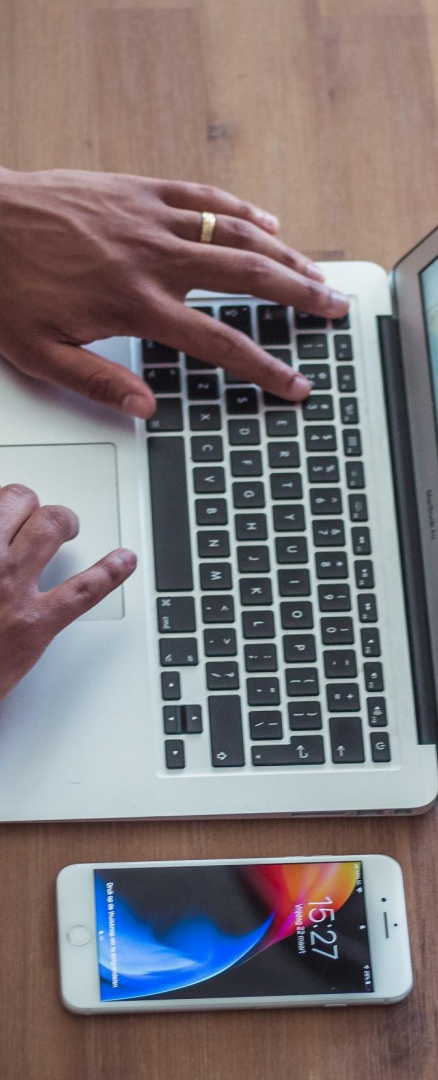
Site Management

Current Site Management

- **Is your current website built using a content management system (CMS) or website builder?**
  - Yes - Dot Net Nuke

- **If possible, can you create or share a login for the site for us?**

Current Site Management

▶ **Who updates the content on the website currently?**

    ▷   I (Michael) I currently update content.

    ▷   The process is formalized but is not currently adhered to due to changes internally. Currently, we make change as either I decide we need them or a request is made from an Executive. A staff request would be reviewed by an Executive.

▶ **Are there any pain points?**

▶ **How often is the site updated?**

    ▷   1 - 2 times per month

▶ **What pages / sections of the site are updated most frequently?**

Future Site Management

- **How many people do you anticipate will attend training?**
  - 2-5 people

- **What roles do you see your staff having?**

Current Site Inventory

Current Content

▸ **Do you anticipate that a lot of the content won't need to be migrated because it's no longer relevant/up to date?**

▸ **Does your organization have a MailChimp account?**
  ▷ Yes - What does SBCERA use it for?

Non-standard Content

- [Webinars](#)
- [Videos](#)
- Presentations
- Registration / Signups
- [Displaying job openings](#)
- Customer support / live chat
- [Agendas](#)
- [Newsletters](#)
- [Benefit estimator](#)
- [Glossary](#)
- Bicycle shop - mentioned in Teamwork

Other Comments / Questions

- ▸ How are we going to get all of this content ready?

Next Steps

- **Karla/DD**
  - Karla to put together content plan & send to SBCERA
  - Once migration starts, Karla will send over content tracking spreadsheet
- **SBCERA Team**
  - Fill out content plan when Karla sends over
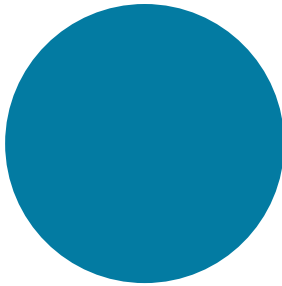 - Keep track of updates on live site while migration is taking place
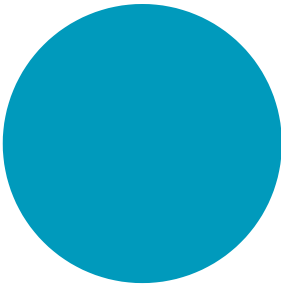
Thank You

Website Style Guide

SBCERA

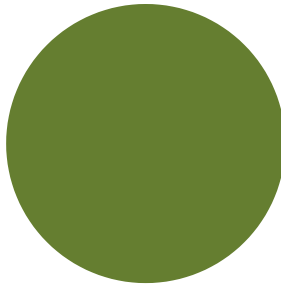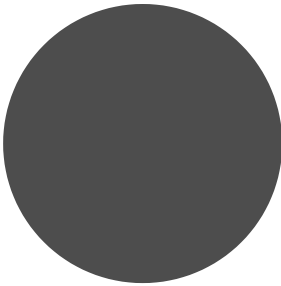## Color Palette
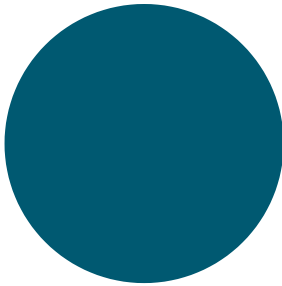
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(Accessibility: Large Text Only)

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#4D4D4D

Typography

Roboto / Regular

Roboto Condensed / Regular

Roboto / Bold

Roboto / Black

Styles

This is a Post Title / 27pt
Post Subtitle/ 23pt

An Awesome Title / 21pt
Body copy migas organic chambray, sriracha raw denim literally chicharrones roof party heirloom skateboard drinking vinegar lo.

An Awesome Title / 19pt
Body copy migas organic chambray, sriracha raw denim literally chicharrones roof party heirloom skateboard drinking vinegar lo.

AN AWESOME TITLE / 17PT
Body copy migas organic chambray, sriracha raw denim literally chicharrones roof party heirloom skateboard drinking vinegar lo.

AN AWESOME TITLE / 15PT
Body copy migas organic chambray, sriracha raw denim literally chicharrones roof party heirloom skateboard drinking vinegar lo.

Table Heading	Table Heading
Table Cell Content	Table Cell Content
Table Cell Content	Table Cell Content