lookthink

PREPARED FOR:

McKnight Brain Research Foundation - Website Revamp SOW

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OUR UNDERSTANDING

The McKnight Brain Research Foundation (MBRF) is in need of a new website and content management system that can better inform and engage external audiences online while empowering internal resources to administer the site with greater ease and comfort moving forward. There is a great deal of interest in the unique type of research MBRF does around cognitive aging and age-related cognitive decline and memory loss — as such, rather than being a passive resource, the website should actively showcase the exciting advancements MBRF is enabling. All efforts, from site organization to content to visual design to technical specifications, should align to deliver a modern, engaging, and educational experience for site visitors (older adults, care givers, general public medical and science professionals, policy makers, funding agencies) and equip site administrators with a robust, easy-to-use system for managing and publishing content.

Throughout this statement of work, we will outline our vision and approach for revamping tmbrf.org to reach the goals outlined above.

A NOTE ON OUR APPROACH

Based on our current knowledge, we understand the budget available should include:

- Website navigation, page layouts, and visual design
- Website build and launch
- Ongoing support for the website through 2019
- Digital/content marketing efforts to drive traffic to the new site

Given everything MBRF is looking to accomplish in the budget, we will leverage a **CMS template in conjunction with a CMS platform like Wordpress** rather than embarking on a completely custom design and build effort. Given that the site will continue to be mostly informational (rather than particularly dynamic or transactional), the **template approach** is advantageous because it will accelerate the entire design and build process while still giving us the opportunity (and budget) to customize areas of particular importance or potential impact.

In this case, we will spend dedicated time at the onset of the project to talk with you and solidify requirements, set short and long term goals, and prioritize features and functionality as needed - and then use those findings to select a specific pre-built website template (also known as a "theme") that best suits your needs. The theme will be chosen out of a massive library that are available on the market. The chosen theme then becomes our basis for site architecture and design, which significantly reduces the amount of time and effort required to build out the site.

It goes without saying that the website design and build is the core of this effort — and will require the majority of the budget. That said, we want to make sure there is an appropriate amount of budget for **content marketing and ongoing support.**

Content marketing will be key for the new website to have true impact. "If you build it, they will come" unfortunately does not apply to websites so we'll want to spend time understanding how best to reach and engage your target audiences (eg email marketing vs online ads vs sponsored keywords) to make the best possible use of available budget.

Ongoing support will allow us to collectively plan for future enhancements that will expand MBRF's engagement efforts and allow the website to integrate new functionality or offerings as MBRF's programs and research efforts evolve. Additionally, setting aside budget for ongoing support will allow us to tackle critical bugs that may arise and regularly apply updates to ensure optimal site performance and security.

Last, you'll see we also included a "flex" line item in the budget that will allow us to explore customizations beyond what is available in the base theme to deliver a unique experience or aesthetic style to a particularly important or impactful area of the site. This way, if there is a particular audience, research study, data/outcomes, etc that you want to showcase in a unique way, we will have funds set aside to design and deploy that unique experience. We will work together to explore ideas and opportunities for this "flex" budget — and determine the best approach for accomplishing that goal within the budget.

The next section of the statement of work describes our step-by-step approach to designing and building a site like this — and digs into the additional task areas (content marketing and long term support).

STEP BY STEP PROJECT OVERVIEW

1	**2**	**3**	**4**
Kickoff and Planning	**Information Architecture and Design**	**Site Development & Content Loading**	**Deployment, Training and Support**

Stakeholder Kickoff	Navigation Definition	Template Configuration	Testing & Training
Content Audit	Taxonomy & Tagging	SEO / Google Analytics	Launch
Theme Selection	Site Design	Content Migration	Post Launch Support

Step 1: Kickoff & Planning

Kickoff

Kickoff for the project will largely focus on pinpointing communications-specific opportunities to engage key audience groups with the latest cognitive aging information, education, guidance, and advocacy efforts. Ideally, we will include ALL stakeholders and decision makers who will be involved throughout the project to ensure all perspectives are taken into account. Additionally, the kickoff serves as an important opportunity to align the whole group on the overall vision, key functionality, messaging strategies, and visual direction we will be aiming to achieve throughout the project.

Topics we'll aim to cover during a kickoff meeting and immediately following include:

1. **Gather internal feedback:** Having a chance to identify and discuss pain points, general feedback, ideas and goals from a variety of internal stakeholders (eg staff, board members) is a critical input as your team will have unique insights that we'll want to collect. Topics we'll dig into include: the role the website should play overall, department/team specific goals, audience expectations, prioritization of information available on the website, and aesthetic requirements and aspirations.

2. **Content review/planning:** We understand that you are looking to expand content and

more regularly post new content once the new website goes live (and support content marketing efforts) - so we will want to spend time discussing and modeling your content goals/strategy moving forward. We will also spend time reviewing your current content load and archiving or editing where appropriate to ensure the new website's content is as concise, engaging, informative, and SEO friendly as possible.

Last, we recommend reviewing analytics to identify any content that is not typically viewed by site visitors and to identify particularly high-traffic areas. All of these activities will be important inputs as we explore and define the new site's navigation, overall architecture, conversion funnels and other key user flows.

3. **Explore and document desired outcomes:** To achieve positive results when the new site is launched, we'll want to define what MBRF stakeholders expect or need the new site to deliver in terms of results (whether for the MBRF, the general public, federal agencies, the healthcare community, funders, grantees, or other groups). Having these desired outcomes documented will provide everyone with a strong common basis of understanding from which to;
   a. Shape and prioritize design and architectural decisions for site visitors
   b. Measure and evaluate success
   c. Inform the ongoing evolution of the site (via both ongoing maintenance and updates and future phase enhancements.)

4. **Explore audience types:** We will want to take time to discuss the primary and secondary audience groups you shared in the RFP and ingest any background insight you may have to ensure the new site caters to the information they are seeking. We'll want to understand where needs and interests overlap vs what is unique to each group — and prioritize as necessary to ensure the site experience is streamlined but also has pathways that allow particular audiences to find specific or nuanced information.

5. **Technical planning:** Last, we'll spend time digging into any areas of technical complexity to ensure that we are planning for them from the onset of the project. At this point, we expect our focus to be on identifying any new functionality or particular layouts you want the website to enable. As mentioned previously, we believe a theme/site template will be

a good solution so the technical requirements uncovered at this time will guide our efforts as we search for an appropriate theme.

6. **Logo Discussion:** We understand that you have selected a different vendor to create a new MBRF logo and look forward to working in coordination with that individual. To that end, we will want to take the opportunity at kickoff to discuss requirements and aesthetic goals for the logo as well as the anticipated process for creating it. Ideally, the logo will be completed before we begin site designs so we can build off of it as a foundational elements of the refreshed "brand." This will ensure that the logo and website have a cohesive look and feel once shared with the public. Last, we will want to discuss the various formats we anticipate needing for the website and other digital channels (social media, digital marketing, etc) to ensure the logo designer creates optimal versions to suit those purposes.

Key Takeaways and Themes Evaluation

After kickoff, we will provide a brief document that summarizes the strategic and tactical vision for the new website. This document will include up to three themes for your consideration that we believe will satisfy your requirements and serve as a solid foundation for the aesthetic style and content that will be housed on the site.

If we have uncovered new requirements or complexities during kickoff, we will also note them in this document and will have a conversation with MBRF stakeholders regarding budget or timeline ramifications.

Theme/Template Selection

Before moving on to Step 2, we will ask MBRF stakeholders to select the theme that will be used as the foundation for the website. Once the theme is selected, we will be able to begin defining key site elements such as the navigation and have a clear direction on how content will flow into the new website.

Step 2: Information Architecture & Design

Navigation Definition

After we complete the content review, audience analysis, and theme selection in Step 1, we will have the key inputs needed to establish an intuitive navigation structure. We will look for opportunities to streamline navigation options to make it easy for users to find the information they are seeking and learn new information about MBRF. We will likely institute a primary and secondary navigation structure, allowing key content areas like research project outcomes, grants, news, and other program information to be prioritized, while contact and history of the foundation will likely live in a secondary navigation.

Taxonomy & Tagging

Taxonomies are leveraged as a tool for organizing and strategically surfacing content related to what a visitor is viewing to ensure visitors can appreciate and derive value from the breadth of knowledge and expertise shared on the site.

The content review exercise will be the first step in defining a new site taxonomy/tagging scheme, as it will allow us to group content into a defined set of categories. If we move forward with a tagging scheme, we will make sure any theme we recommend includes content areas for related content pulled in via tags. That way, when content is migrated or when new content is created, site administrators will tag content with the appropriate category ensuring that on the front end, site visitors will be presented with like content throughout the pages they visit.

Logo

We reserved a handful of hours in our budget so that we can review the outcomes of the logo design effort and offer feedback where appropriate to ensure that we have the versions necessary for the website and future digital marketing work. We also recommend that the logo be completed in advance of our design work to ensure we are building upon the foundation that the logo design will set.

Visual Design

Using the chosen template's homepage as a base, we will investigate and identify imagery, colors, and fonts to best reflect MBRF's personality and target audiences. Our working

assumption is that we'll explore new styles (i.e. typography, primary and secondary colors, imagery, texture styles) to ensure MBRF has a unique identity apart from the University of Florida — and generally elevates MBRF's status as experts in the brain research space. *That said, if there are specific visual requirements we need to adhere to, we will be sure to stay within those bounds. We will be sure to discuss this at the kickoff and will proceed based on the conclusion we arrive at then.*

Here you can see a similar exercise we did for a boutique real estate firm, where we applied different imagery and colors to a theme's homepage to help the client visualize the new site and choose style elements that best reflect their company's personality.
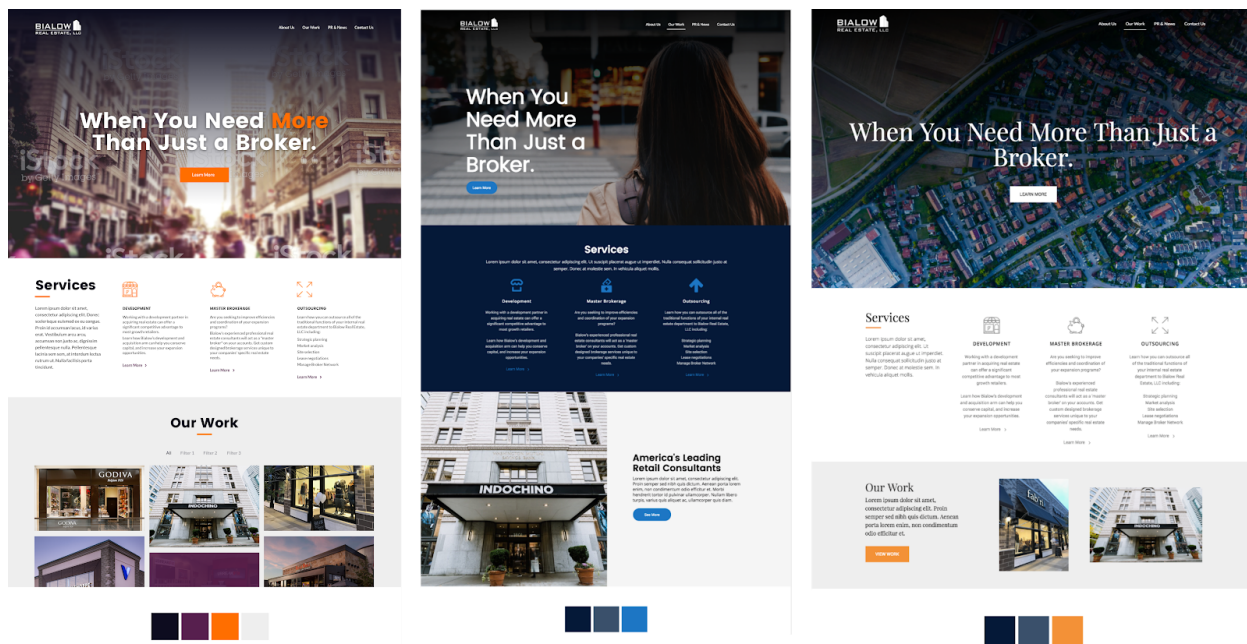
We include up to two rounds of iterations to narrow in on the visual style for the site. Once we have an agreed upon direction, we will conduct the same exercise on up to three key/unique page types within the template.

Depending on available budget (and how you want to use the flex budget), we can also look at potential opportunities for custom design elements, e.g. custom graphics that will draw particular interest and interactivity from site visitors.

Step 3: Site Development & Content Loading

Build/Configuration

Following design approvals, our development team will begin the process of configuring and styling the selected theme to support the approved information architecture, design and functionality.

First, we'll configure the server for development (whether your existing server or a new hosting setup that we identify together). This entails deploying the latest version of the selected CMS, with all necessary plugins to support the functionality.

The site configuring and styling will occur on a rolling basis, starting with universal elements, such as the header and footer, followed by individual page layouts. Once the content is in place, it will be fully manageable by MBRF's team.

Content Migration

Based on our current understanding, we anticipate some of the existing site content will be migrated to the new website and other content will be archived or rewritten. We will assess if it's most efficient to automate any parts of the migration or handle the migration manually in collaboration with MBRF stakeholders (which can be most cost effective and accurate if it's only a small amount of content). At this point, MBRF stakeholders can also be writing and loading new content to fulfill the content strategy defined earlier in the project.

SEO & Google Analytics

Last, we will install Google Analytics on the website, providing metrics that can assist your team in understanding, analyzing, and tracking your site's traffic and drivers so you can optimize your users' experiences moving forward.

Step 4: Deployment, Training & Support

Testing

After all of the content is loaded, we will utilize a strict testing plan to ensure the site is compatible with contemporary versions of the most widely used web browsers on mobile devices and desktop/laptop computers (listed below).

Additionally, this plan will include the following:

- Checking the site for bugs and errors;
- Ensuring that links and integrations are all functional;
- Ensuring that links direct to the proper location.

Once MBRF approves the final and completed site, we will work with your team as needed to push the site live in your hosting environment.

Browser Support

On all development projects, the LookThink development team builds all projects to support the following browsers:

- Internet Explorer 11
- Microsoft Edge (latest)
- Google Chrome (latest)
- Mozilla Firefox (latest)
- Safari/Safari Mobile (latest)

Mobile testing for responsive styling and functionality is done throughout the process on the most recent browser versions on the latest iOS/Android operating system versions. LookThink does not support outdated hardware or operating systems.

If older versioned browser requirements are needed, the LookThink development team will ensure the inclusion of safe fallback styles and functionality to allow older browsers to properly display the site content. Identical functionality is not guaranteed.

Training

Prior to site launch, we will schedule an in-person training session with designated stakeholders, accompanied by documentation on how to administer the site. These sessions are intentionally hands-on, wherein your team will be encouraged to try different tasks as a means of getting comfortable with the new website. We can also record the session for your later reference.

Post Launch

We build in two weeks of post-launch support into all of our proposed budgets. This enables us to tackle any questions or issues that may arise as you settle into your new site. After that two week period, we often transition to a separate arrangement for ongoing support and enhancements via a monthly retainer or on an ad-hoc basis.

Additional Services

Content Marketing

As an organization that seeks to educate the public about an important topic (cognitive aging), it will be critical for MBRF to develop a marketing strategy focused on promoting relevant content. As such, at the onset of the project, we will evaluate the current content and (with your input) take note of what has or has not resonated with target audiences. We will also discuss any current or planned marketing activities and goals (eg views, conversions, etc), and if you don't have those fully fleshed out, we can help do that too. Understanding your marketing goals upfront will help us craft a complementary approach for the website design and functionality that will drive more traffic to the website and more interest in the content. Ultimately, analysis of marketing activities will help us determine which types of content are most effective in pursuit of those goals.

Creating and publishing the content is only half the battle; it must be distributed and promoted in a way that will entice audiences to actually consume the content and come back for more. There are several channels (eg email marketing, digital ads, social media posts, social media ads, video, etc) that we will explore as part of our discussions around content marketing opportunities. As a

group, we will determine which channels and methods best suit your content, your key audiences, and your stakeholders capacity to support the strategy and goals in the long term.

Within the budget within this statement of work, we anticipate that we can help create the content marketing strategy, work with you to set up the platforms to support the strategy, and write select sample content and/or create templates. We will then mostly hand over the responsibility of regularly creating and distributing content to the appropriate MBRF stakeholder. Should you want LookThink to be wholly responsible for content marketing in 2019 and beyond, that is certainly something we could do, but we would first need to have a more detailed discussion around frequency and type of content to determine an appropriate monthly budget for that service.

Ongoing Website Support

Our recommendation would be to set aside between $2,000 and $4,000 per month depending upon the degree to which you anticipate further ongoing enhancements to the site requiring our involvement. That range is based on our experience with similar sites and organizations -— and would be intended to cover the ongoing provision/maintenance of website services such as: security patches and updates, troubleshooting of administrative issues that may arise, ad-hoc visual design or styling help for new content, as well as a monthly check-in to review site analytics and discuss potential opportunities for further optimization and improvement.

That said, we are also comfortable working on an ad hoc basis, in which case small tasks and/or larger scale projects would be scoped individually and billed on a T&M basis.

TIMELINE

Our estimated timeline to complete the project above is between 8-10 weeks. We are assuming a start date in late March or early April. Below is an estimated outline of the timeline:

	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Week 9	Week 10-?
Kickoff & Planning	■	■								
Information Architecture & Design		■	■	■						
Logo Concepting & Iteration		■	■	■						
Site Development & Content Loading				■	■	■	■			
Deployment & Training							■	■		
Post Launch Support								■	■	■
Project Management	■	■	■	■	■	■	■	■	■	■

Project Management Process/Governance

Approach to Project Management

You can count on your LookThink Project Manager to communicate openly and often to ensure that the project stays on time and on budget — or to immediately discuss how changing requirements or delayed feedback cycles may affect overall scope.

Your PM is with you every step of the way, from the creation of the overall project plan to initial requirements documentation to discovery sessions to design review and final delivery. Your PM will actively report to project stakeholders with status updates, deadlines, and ongoing activities and be responsible for identifying, monitoring, and mitigating risk.

Status Meetings

For projects of this type, we always recommend the establishment of a regularly scheduled status meeting (e.g. weekly) between our Project Management personnel and the corresponding member(s) of your team. This meeting not only serves to keep everyone informed as to the overall progress of the effort and budgetary realities — but also provides the opportunity to identify and address any risks, impacts, or additional requirements that may arise. Furthermore, it will enable us all to review and prioritize project activities and scope if need be to ensure on-time and on-budget delivery.

Assumptions

The estimated budget for this project is based on the understandings outlined previously as well as the following assumptions:

- MBRF will appoint and designate all project stakeholders at the onset of the project. These individuals will be consistently available to review and comment on work product.
- All feedback will be provided in a timely fashion - within 2 business days. Any delay in feedback beyond that may result in an extension of the final delivery date.

- The MBRF will be responsible for writing any new content necessary for the new site. Our team will provide consultative input on your messaging as needed to ensure that it is communicating effectively and that it is of appropriate length and style for the web.
- LookThink will be provided with access to the current website and its associated systems (if there is anything integrated with it).
- MBRF will be responsible for DNS management. Should you need assistance, LookThink is happy to provide support on a Time and Materials basis.
- LookThink will test contemporary versions of the most widely used browsers and devices - in keeping with current industry best-practice. Should MBRF determine that older versions of a given browser need to be supported (e.g. IE 10), LookThink will provide a specific estimate and cost for MBRF to approve prior to the initiation of the work.
- The website will be tested on mobile Safari (iPhone and iPad) and the latest version of Chrome for Android. NOTE: The current budget estimate does not include testing for Blackberry or Windows Mobile.

Terms and Conditions

- Once project fee is paid in full to LookThink, all elements of text, graphics, photos, contents, trademarks, or other artwork furnished to MBRF by LookThink are owned by MBRF.
- LookThink assumes MBRF has permission from the rightful owner to use any images or design elements that are provided by your organization for inclusion in the website, and will hold LookThink harmless from any claim or suit arising from the use of such elements.
- LookThink retains the right to display graphics and other web content elements as examples of its work in its portfolio.
- This agreement becomes effective upon signature of client's authorized agent(s).
- Estimates are provided based on similarly sized and scoped projects. All work is charged on a Time and Materials basis of $165 per hour. LookThink will provide proactive communications indicating current burn rates and will inform MBRF if a line item is approaching the scoped budget.

ACCEPTANCE & APPROVAL

McKnight Brain Research Foundation

LookThink, LLC

_____

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Signature   Date

Signature   Date

_____

_____

Printed Name

Printed Name

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Title

Title