WORDPRESS

Library Website Development Proposal

Prepared For:
James Blackstone Memorial Library

This proposal will expire thirty (30) days from delivery date.

Cover Letter

Katy and Project Team,

Based on our firm's collective experience, which includes delivering over **55+ similar Library projects**, we have put together a proposal that captures all your requirements and some recommended best practices.

From our initial review, we understand the project team's goal is to have a contemporary, modern, and user-friendly website that will be easy to maintain by internal staff at the Library. We also understand that mobile optimization, website accessibility, and other key items are critical to the project's success.

We feel we are a strong fit for this project based on our work plan and relevant experience. We have broken down our response following the table of contents below:

1. **Objective**
2. **Project Plan (Service Levels, & Add-Ons)**
3. **References (Featured Clients & Awards)**

As you consider our proposal and **award-winning work**, we understand that you have a tough decision ahead. Please do not hesitate to reach out to us via my contact information below if any questions come up.

We appreciate your consideration for this project!

Best,

Thomas Stirling

CEO/Founder

stirling
BRANDWORKS
P: (781) 369 - 5154
E: Thomas@StirlingBrandworks.com

Objective

This project is an important initiative for the Library, its stakeholders and the broader community. The following goals include those provided along with best practices we suggest. These have been carried forward as part of our proposal:

Focus Areas	
User Experience	Provide a modern, up to date, and intuitive user experience that empowers the core audiences while increasing engagement. Incorporate WC3 accessibility guidelines and Section 508 of the US Rehabilitation Act.
Modern Design	Identity a visions for the visual design through a homepage prototyping stage and design mockups. Design will involve fonts, colors, and graphics while being both modern and responsive.
Content Management	Build on a robust content management system (**WordPress**) that is easily understood by admins, is powerful enough to support all their needs, and allows for future growth.
Search	Optimize site for both SEO and Accessibility Standards. Greatly improve discovery and access of the Library's information, collections, resources and content - including traditional and digital.
Technology	Choose the best site architecture and technology implementation. Ensure the website functions well across various devices, and is built mobile-first.
Transition Planning	Strategically oversee content migration process. Provide hosting recommendations (**Stirling, WP Engine, or Pantheon**). Reorganize and streamline existing content onto the new website.

Project Plan

Summary

Below we have included an entry level of service that provides James Blackstone Memorial Library with an elevated new website built on the WordPress CMS. We have itemized features and services provided during this engagement.

Website Development Proposal

Discovery Session
Host a discovery meeting with the project team to review branding guidelines, design inspiration, discuss best practices and project goals.

Content Audit & Sitemap
Review the existing website content structure to develop a streamlined, top-level sitemap to improve the overall navigation of the site, including goals for menus and content categories.

UX/UI Design Phase
Provide one (1) unique concept for the new website's homepage focusing on the library and its community based on findings from the project intake. The virtual prototype of the concept will be reviewed as a project team, supporting a deeper discussion around the user experience.

Staging Environment Setup
Provision a staging environment for seamless development on a private server, allowing for a seamless switch to the new website at launch.

WordPress CMS Setup
Create global styling and layouts based on the client's branding within the WordPress CMS, following industry best practices and established goals.

Mobile-First Responsive Design
Provide a seamless experience across all devices, with support for a mobile-first approach to content loading and resource optimization.

Standard Template Gallery
Implement layouts for all required pages including: hours and branch page, error pages, blog page, and a single blog post template.

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Summary

Website Development Proposal (Continued)

Dynamic Page Layouts
Develop four (4) general interior page layouts to provide variety in how the content is displayed across the new website. The following re-usable layouts for use across the site are included:
- Homepage layout that supports integration with calendar, posts/news, and other resources serving as a hub for patrons.
- Hours and branch information page with directions.
- Database A-Z page that shows all your e-resources in one place.
- Standard interior page layout for all content pages.

ADA Accessibility
Support W3C standards, implementing best practices, color theory, and aria tags to classify content and make it accessible to assistive equipment.

Event Management, Room Booking & Museum Passes
Integrate seamlessly with existing 3rd party solution to capture upcoming events and room booking via an iFrame embed or a public API.

Content Migration
Assist with content migration support within a bank of twelve hours. The client will then be responsible for any additional content migration.

Google Analytics
Setup analytics tracking codes with Google Analytics for on-demand reporting on site usage, visitor data, and metrics via the site dashboard.

Training & Launch
Assist with launch process. Prior to the launch date, train client on the WordPress CMS, ensuring success of website management post-launch.

Total: **$19,360**

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Proposal For: James Blackstone Memorial Library

Included Features

Included Features

| Summary	
Drag-and-Drop Editing Support for drag-and-drop editing across page templates and theme files.	✓
Live Hours & Branch Management Implement live hour module that supports holidays, off-season hours vs. regular hours, multiple branches, and automated updates.	✓
Robust Database Manager Provide a database module for digital resources that includes filtering, A-Z view, and a legend identifying access requirements. This module can be broadcasted on key pages (Home, Kids/Teens, Adults).	✓
Form Builder Setup a drag-and-drop form builder that can be used to collect data, host forms (ex. ask a librarian), take donations, and gather site feedback.	✓
Dynamic Media Carousels Implement a carousel that is book scanner compatible, integrates with the library catalog and includes email functionality for list sharing. This module can be used across the site for staff picks, collections, new titles, etc.	✓
Library Blog Provision WordPress blog functionality, allowing for easy posting, categories, and broadcasting to key pages (Home, Kids/Teens, Adults).	✓
Site-Wide Alert Bar Include support for a site-wide alert bar with color-coded notices and auto expiration date so that messages come down automatically (closures, etc.).	✓
Google Translate Support patrons with automated translations across the site from Google.	✓
Toggleable Search Provide a toggle between site and catalog search results for patrons across the site.	✓

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Add-Ons

Add-Ons

Below we have outlined additional offerings that provide the project team with options at a higher level of service. All of these options compliment the website design process outlined in the proposal.

Add-Ons	
Community and User Survey Stirling will design and conduct a user survey, aimed at gaining a deeper understanding of the issues with the current website and the community's aspirations for the new one. This process will include 6-8 phone interviews, coupled with a detailed questionnaire distributed to the wider community. All findings will be compiled into a report to inform the redesign process.	**Starting at $3,360**
Extended UX/UI Design Phase Provide an additional unique concepts for the website's homepage focusing on the library and its community based on findings from the project intake. The virtual prototype of the concept will be reviewed as a project team, supporting a deeper discussion around the user experience.	**Starting at $2,560**
Custom Genealogy Page Design and develop a fully custom genealogy page. This page will be thoughtfully laid out, making it easy for users to explore and connect with their local heritage.	**Estimated at $5,600**
Ongoing Support Assist with the turn-key management of the site by overseeing all of the core updates, plugin updates and other maintenance on an annual basis. Provide a help desk for ongoing support, bug fixing, additional training and minor design changes. Provide hosting at an additional fee.	**Starting at $3,080**
Third Party Integrations Stirling will ensure smooth integration with any additional third party subscriptions and applications.	**Starting at $1,440**

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Case Studies

Wellesley Free Library

The Wellesley Free Library, a cornerstone of its community since 1883, needed help modernizing its services and catalog for an increasingly digital world. The Library sought a partner to create a custom website reflecting their heritage and identity while making it easy and intuitive for patrons to access its vast resources digitally.
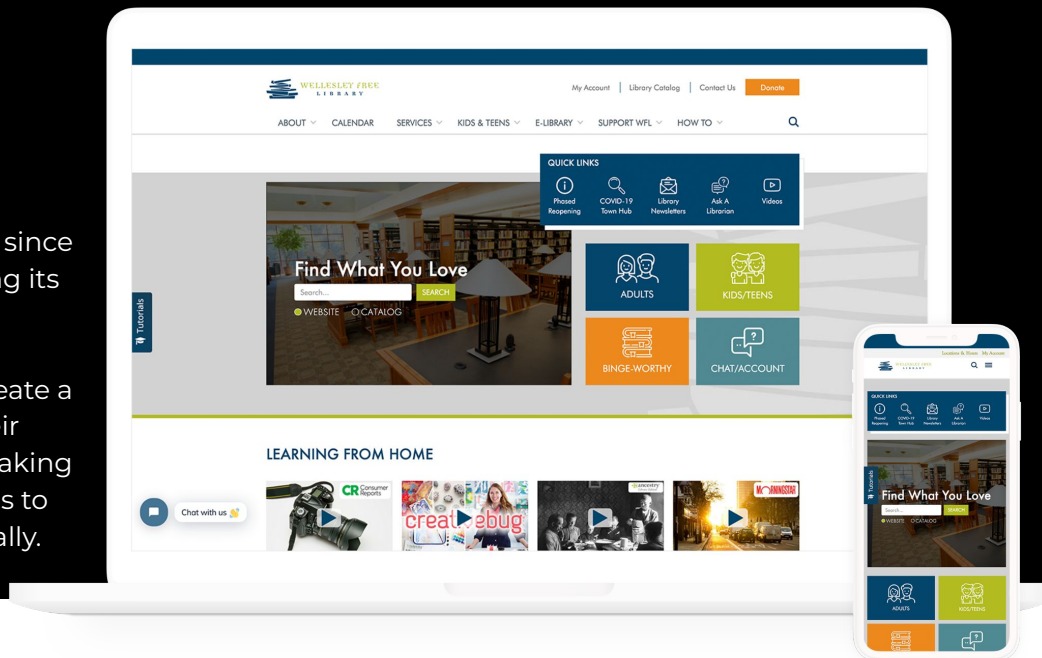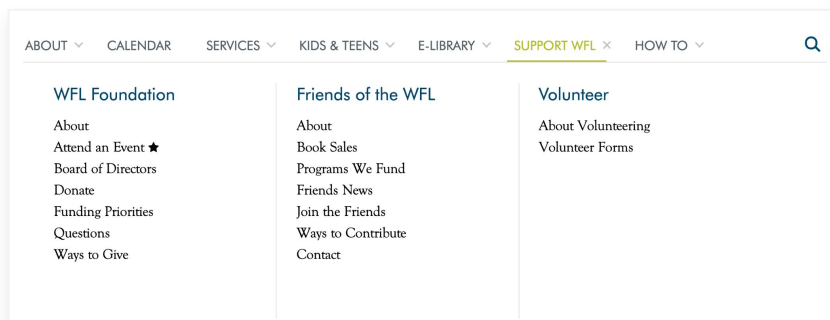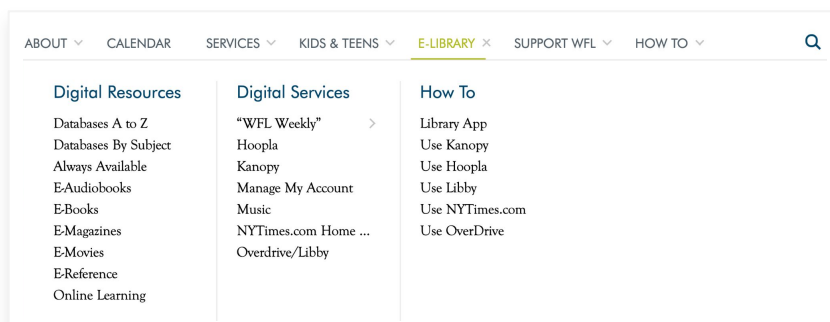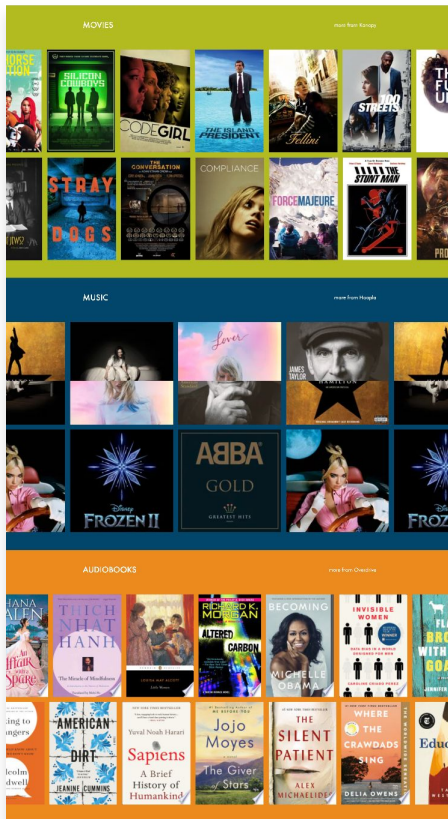

Services Included:

- Mega-Menu Structure
- Binge-Worthy Content
- Audience Segmentation

User Research

Mega-menus organize the full website menu into smaller chunks. Users can toggle between menu items to get an expanded list of options within a category, creating a more user-friendly experience.

Wellesley Free Library

Binge-Worthy Content

The Binge-Worthy section was content curated by the Wellesley Free Library for adults interested in streaming digital content. The section features movie, music, and audiobook collections for these visitors.

Audience Segmentation

The Wellesley Free Library had a great team of librarians assisting visitors. We brought their presence into the new website for visitors to benefit from their expertise and passion. Library staff was empowered to manage custom sections for specific audiences.

ADULTS

KIDS/TEENS
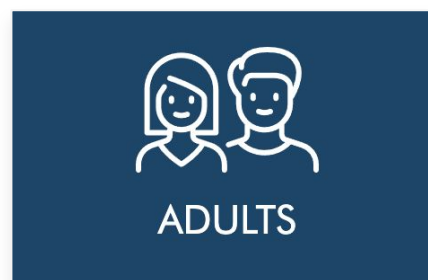
Needham Free Public Library

Needham Free Public Library required a partner that could assist in transitioning from the Town website, and bring a new identity to the library that incorporated elements of the building and a new logo.
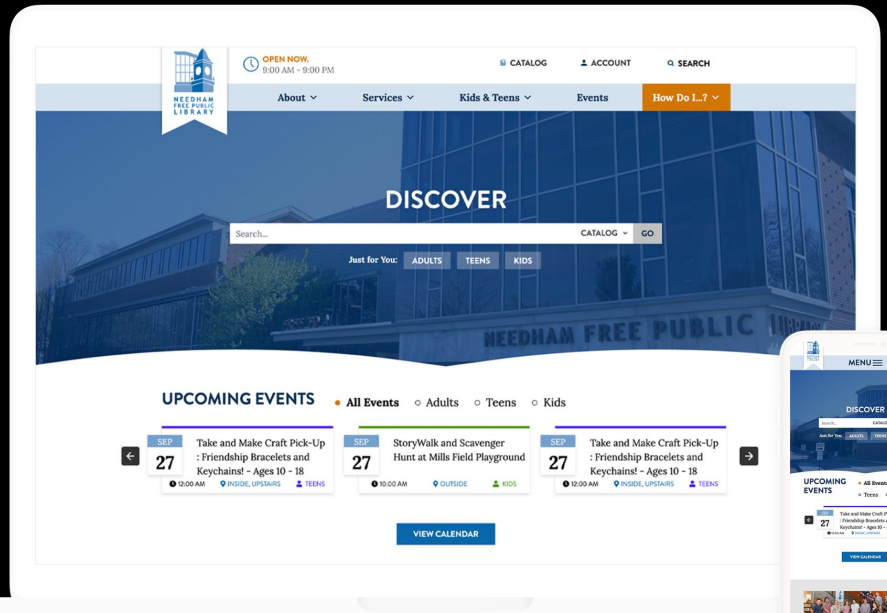
Project Timeline: 4 Months

- ◆ User Research
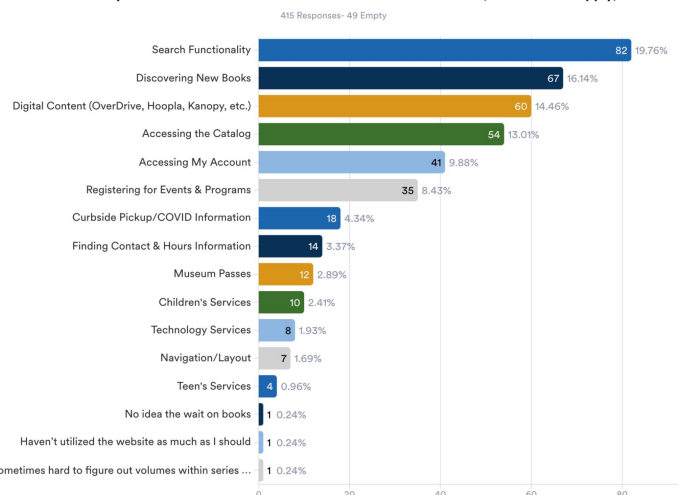- ◆ Extended Design
- ◆ Custom Templates

User Research

264 Survey Submissions

Bringing patrons into the conversation not only delivers a better overall user experience, but also makes the community feel included in the design process. Patrons that respond to a survey can be leveraged for virtual focus groups, and interviews. They can also be re-engaged later on in the process for usability testing once a prototype of the new site is developed.

Where do you have the most frustrations with the current website? (Check all that apply)

415 Responses- 49 Empty

Search Functionality	82	19.76%
Discovering New Books	67	16.14%
Digital Content (OverDrive, Hoopla, Kanopy, etc.)	60	14.46%
Accessing the Catalog	54	13.01%
Accessing My Account	41	9.88%
Registering for Events & Programs	35	8.43%
Curbside Pickup/COVID Information	18	4.34%
Finding Contact & Hours Information	14	3.37%
Museum Passes	12	2.89%
Children's Services	10	2.41%
Technology Services	8	1.93%
Navigation/Layout	7	1.69%
Teen's Services	4	0.96%
No idea the wait on books	1	0.24%
Haven't utilized the website as much as I should	1	0.24%
It can be sometimes hard to figure out volumes within series ...	1	0.24%

Jackson County Library

Jackson County wanted an out-of-the box website design that brought their personality and flair into the look and feel. What we delivered is UX/UI that greets visitors with a warm-yet-quirky first impression.
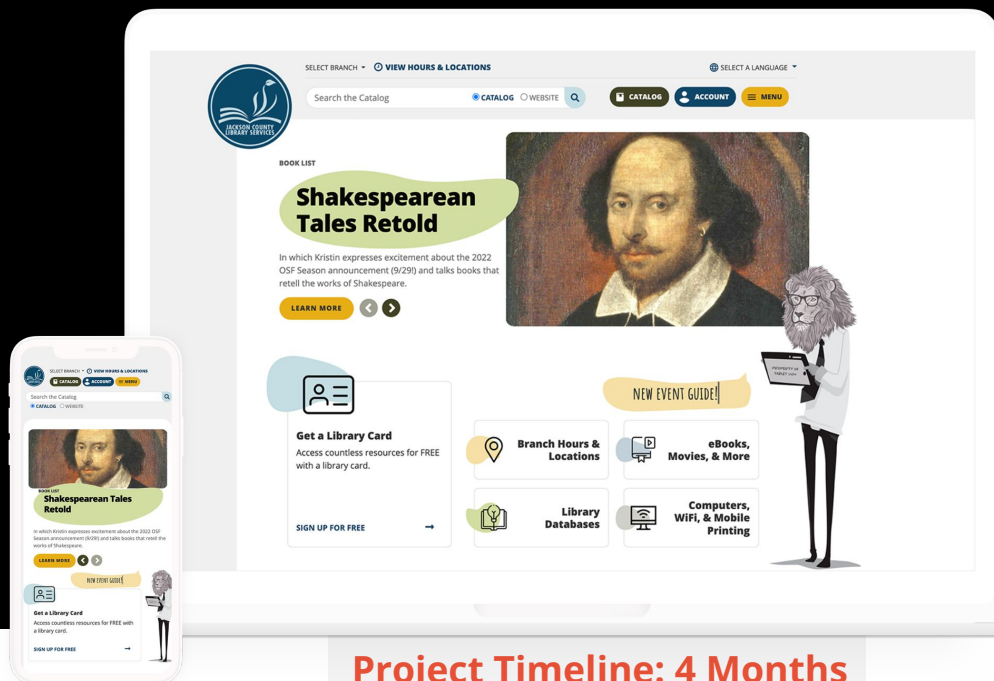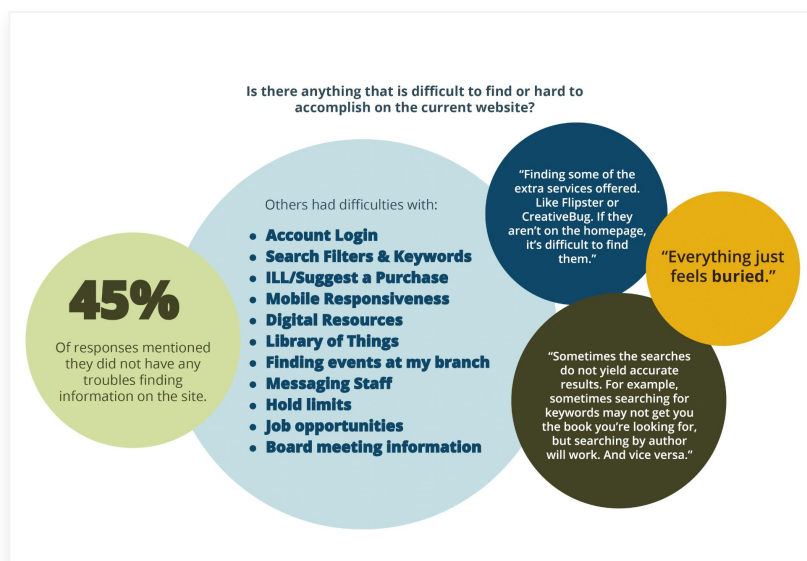
Project Timeline: 4 Months

- ◆ User Research
- ◆ Brand Personality
- ◆ Custom Branch Pages

User Research

560+ Survey Submissions

Bringing active users into the conversation not only delivers a better overall user experience, but also makes the community feel included in the design process. Patrons that respond to a survey can be leveraged for virtual focus groups, and interviews. They can also be re-engaged later on in the process for usability testing once a prototype of the new site is developed.

Is there anything that is difficult to find or hard to accomplish on the current website?

45%
Of responses mentioned they did not have any troubles finding information on the site.

Others had difficulties with:
- Account Login
- Search Filters & Keywords
- ILL/Suggest a Purchase
- Mobile Responsiveness
- Digital Resources
- Library of Things
- Finding events at my branch
- Messaging Staff
- Hold limits
- Job opportunities
- Board meeting information

"Finding some of the extra services offered. Like Flipster or CreativeBug. If they aren't on the homepage, it's difficult to find them."

"Everything just feels **buried**."

"Sometimes the searches do not yield accurate results. For example, sometimes searching for keywords may not get you the book you're looking for, but searching by author will work. And vice versa."

Work Samples

Below we have outlined a cross section of the **55+** other Library clients that we have supported in branding, marketing and website design.

Past Clients

- **Woburn Public Library**
- **Belmont Public Library**
- **Public Library of Brookline**
- **Bedford Public Library**
- **Medfield Public Library**
- **Wayland Free Public Library**
- **Billerica Public Library**
- **Falmouth Public Library**
- **Saugus Public Library**
- **The Insurance Library**
- **Norfolk Public Library**
- **Hollis Social Library**
- **TOHP Burnham Library**
- **Mashpee Public Library**
- **Gladys E. Kelly Public Library**
- **East Providence Public Library** (Basic)
- **Malden Public Library**
- **Bacon Free Library of Natick**
- **Georgetown Peabody Public Library**
- **Yakima Valley, Washington State**
- **Public Libraries**
- **Northborough Public Library** (Rebrand)
- **Ipswich Public Library**
- **East Hampton Public Library**
- **Wellesley Public Library**
- **Parker Memorial Public Library**
- **Palmer Public Library**
- **Rockport Public Library**

- **J.V. Fletcher Library**
- **Westborough Public Library**
- **Revere Public Library**
- **Auburn Hills Public Library**
- **Redford Township Library**
- **Dripping Springs**
- **Gleason Public Library**
- **Winchester Public Library** (Basic)
- **Oak Bluffs Public Library** (Basic)
- **West Hartford Public Library**
- **Lyon Township Public Library**
- **Jackson County Library Service**
- **New Haven Free Public Library**
- **Flint Memorial Library**
- **Needham Public Library**
- **Florham Park Public Library**
- **Newton Free Library**
- **Shrewsbury Public Library** (Branding)
- **Lake Travis Public Library** (Support)
- **Saline County Library**

IN DEVELOPMENT:

- Manchester By-The-Sea Public Library
- Lane Memorial Library
- Goodnow Library
- Beverly Public Library

References & Awards

Below we have included contact information for a short list of references. Additional references are available upon request.

Past Clients

Ryan Bradley
Jackson County Library Services

W: https://jcls.org/
E: rbradley@jcls.org
P: 541-734-3973

Roy MacKenzie
Public Library of Brookline

W: https://www.brooklinelibrary.org
E: rmackenzie@minlib.net
P: 617-730-2344

Jamie Jurgensen
Wellesley Free Library

W:https://www.wellesleyfreelibrary.org/
E: jjurgensen@minlib.net
P: 781-235-1610 x1129

Caitlin Staples
Westborough Public Library

W: https://westboroughlibrary.org/
E: cstaples@cwmars.org
P: 508-871-5283

Industry Awards

INDIGO DESIGN AWARD
3x Winner

HERMES CREATIVE AWARDS
4x Winner

MMA Massachusetts Municipal Association
8x Winner

LMA
5x Winner

Thank You!

This is a RFP response for services rendered for a new website build with the **WordPress CMS.**

If we are selected for this project we will provide an updated timeline, staffing plan, Statement of Work and Master Consulting Agreement prior to project commencement.

stirling
BRANDWORKS

Clearpeak Interactive, Inc
Your trusted partner on the Web

Proposal for: Blackstone Library Website Redesign
Prepared by: Jim Woodman – March 7, 2024

1. Introduction and Scope of Work

Blackstone Public Library (BPL) in Branford, CT is planning a full-scale redesign and development of their website currently located at https://www.blackstonelibrary.org/. The purpose of the project is to enhance the library's visual brand, add features, and ease site maintenance and editorial workflow.

Clearpeak Interactive is pleased to submit this proposal to redesign the BPL site, code design mockups with responsive, mobile-friendly HTML 5/CSS 3, and build a fully functional website using the Craft content management system.

This project has been broken out into the following areas of work:

Visual Design & Information Architecture

o Visual design of website using a clean, professional and engaging look that accurately captures the spirit and mission of BPL.

o Intuitive, clear navigational structure with drop down menus, sub navigation menus and breadcrumbs as necessary

o Follow a consistent and inspiring color palette

o Consistently implement any existing BPL branding requirements

o Consult with BPL in helping to effectively organize content throughout the site to create the best possible user experience

o HTML 5/CSS 3 Responsive design that automatically adapts to all browsers, platforms and devices including smartphones, tablet and desktop computers

Preliminary Functional Specifications

o Homepage Carousel function to highlight special events and programs.

o Modular custom fields available for use on all pages such as tabs, accordion panels, photo grids, bordered panels, video, and captioned images

o Integration of Social Media sites such as Facebook, Twitter, Pinterest LinkedIn

o Dismissable/auto-expiring alert system that can be activated on any page of the site for emergency messages

o Real-time hours widget for displaying Open/Closed message

o Integration with third-party applications such as Libcal, Assabet Interactive, Library Insight, LibraryThing, Novelist and similar vendors

o Ability to add video and audio files to all pages be it youtube, vimeo or hosted video

o Special attention will be paid to search engine optimization with page-specific meta and title tags

o Full 508 Accessibility compliance

o Multiple forms ie Ask a Librarian/Contact/Request Materials/ILL, Friends membership

o Integrate third-party donation function

o Robust search and browse capability

o Library News listing with browse by date and category

o Implementation of Bookletters and similar book widgets

o Implementation of SSL Security certificate for https delivery

o Numerous other static info pages as needed—site navigational structure TBD

o Integration of Google Analytics for site statistics and tracking reports

o All site content will be easily edited by the Craft control panel, which allows for unlimited member groups with specific access privileges as well as complete editorial control of material.

2. Approach/Methodology

Work on this project will proceed in the following phases:

1. Visual Design & Information Architecture

a. Discovery and Review

   Clearpeak to meet with BPL to review all content, architecture, goals, audience, and technical requirements for the website. After the initial kick-off meeting, Clearpeak will conduct research on competitor sites and assess the strategy, content, and programming needs of the site with the goal of determining the best architecture and technology for the site. The Findings phase will result in a .pdf text document that states the final site architecture and outlines the key directives for Client review and approval before proceeding.

b. Information Architecture

   Upon reviewing all relevant material received from BPL and in conjunction with the information revealed in the Discovery phase, Clearpeak will develop the information architecture of the site to present BPL's wealth of information in an easily navigable and intuitive structure. The main navigational structure and information hierarchy of the site will be presented in the form of a detailed sitemap and navigational scheme. Note: We will review any existing sitemap in the process.

c. Wireframes

   With the architecture in place, our next step is to deliver wireframes for the home page and all unique page types to show navigation and other functional elements, but without regard to specific visuals or style.

d. Preliminary Design

Clearpeak will develop two alternative design approaches for the BPLs home page and internal templates, such as image galleries, blog pages or static pages.

e. Design Refinement

Generally, up to three rounds of changes will be made to the chosen design. After establishing the final, approved design of the home page, Clearpeak will present the additional page designs of the site. Again, if necessary, up to three rounds of changes will be made to these internal page templates.

2. Code finalized design mock ups using fully responsive HTML 5/CSS 3/Javascript

3. Create site database structure, build templates and program all site functionality described above using Craft and any custom PHP/MySQL as required by the site specifications.

4. Import all new or existing site content

5. QA and testing of beta site prior to launch with support of following browsers and operating systems:
   o IE10+
   o FF3+
   o Safari 3.2+
   o Google Chrome
   o WinXP+

- o Mac OSX 10.4+
- o Iphone
- o Ipad
- o android

6. In-person training of BPL staff will include teaching all steps necessary for ongoing maintenance of the site such as editing pages, creating new pages/entries and uploading photos and video. Written training documentation will also be provided.

7. Ongoing maintenance will be performed as part of service contract entered into between Clearpeak and BPL.

8. Clearpeak Project Manager Jim Woodman will oversee all aspects of the project to ensure that milestones are met in a timely manner and deliverables meet expectations. Basecamp will be used as our project management tool to provide a clearinghouse for all project-related files, materials and discussions. A project calendar will be established outlining all milestone dates and associated deliverables. A schedule of ongoing status calls will also be provided for regular updates.

3. Assumptions

1. After initial launch, all content editing and changes to be performed by BPL

2. Site must be served on a Linux/Apache server to accommodate Craft

3. All brand identity material such as Logo to be provided by BPL

4. All content writing and editing will be the responsibility of BPL

5. All website content and branding materials remains the exclusive property of BPL.

6. Clearpeak reserves the right to showcase the new BPL site as part of their "portfolio"

7. Any changes or additions to the technical requirements listed above will be considered a "Change Order" and may incur additional fees and schedule time.

Ongoing Technical Support and Maintenance

After the final site development is complete, Clearpeak will train BPL staff members in the regular maintenance of the site using the Craft content management system. This training will be included in the total cost of the site.

The completed website is "guaranteed" to perform as specified in this contract. Any changes required to fulfill this guarantee will be made without cost.

Ongoing site maintenance will be performed as part of a service agreement between BPL and Clearpeak.

Site Hosting

If required, Clearpeak offers CMS-optimized hosting at a rate of $75/mo. This package includes:

- 3.5GB Guaranteed RAM
- 10GB Disk Space
- 10,000GB Bandwidth
- Weekly site backups of all files and databases

4. Project Costs and Timeline

Development Phase	Estimated Cost	Time to Complete
Visual Design including discovery, Information Architecture, wireframes and design mockups.	$7,000	4-6 weeks
Front-end Coding: Code design mock ups using responsive HTML 5/CSS 3/JQuery	$3,000	2-3 weeks
CMS Development: install, configure and create channels and build out all functionality described above	$8,000	4-6 weeks
Beta QA/Testing of site	included	1-2 weeks
Client CMS Training/Documentation	included	2-3 hours
Total Cost:	**$18,000**	**11-17 weeks**

Payment Schedule

1. 1/4 of total cost will be due as a deposit after the contract has been signed
2. 1/4 of total cost will be due after visual design phase is complete
3. 1/4 of total cost will be due when site database structure is in place
4. Final quarter will be due at successful completion of project

Please let me know if you have any questions about this proposal or any aspect of the project.

Thank you!
Jim Woodman
Clearpeak Interactive, Inc

5. Company and Team Profile

Clearpeak Interactive, Inc

Since 2007 Clearpeak has been an established leader in building websites for healthcare, research, and educational institutions. We specialize in large, content-rich sites where data must be meticulously organized and navigation must be intuitive to allow for maximum access to highly complex information. Everyday we work with organizations to build beautiful websites that work over the long haul. Although technologies change daily we believe that the latest is not always the greatest and sometimes order, restraint and a long-term relationship are what you really need from an agency.

Here is a list of some of our most recent clients:

- o Harvard University Continuing Education
- o Harvard Graduate School of Education
- o Harvard Distance Education Program
- o Harvard Law School
- o Harvard Business School Publishing
- o Boston College Physics Department
- o Andover Newton Theological School
- o Leominster Public Library
- o Saigon South International School
- o Boston Center for Jewish Heritage
- o Public Library of Brookline
- o Northeast ALS Consortium

- o Landmark College
- o Emory University
- o Diabetes Education and Camping Association
- o Houghton Mifflin
- o Sherborn Library
- o Sargent Memorial Library
- o Westwood Public Library
- o Worcester Talking Book Library
- o Lymphatic Education & Research Network
- o International School of Luxembourg
- o Massachusetts Historical Society
- o Massachusetts General Hospital
- o Massachusetts Eye & Ear Infirmary
- o Concord Free Public Library
- o Framingham Public Library
- o Partners Health Care
- o Rampart Investment Management
- o Tuck School of Business at Dartmouth College
- o Fidelity Investments
- o Hanover Insurance
- o Hewlett Packard
- o and many more

Please see our complete client list and online portfolio at
www.clearpeak.net

Jim Woodman

Founder/Project Manager. A trained librarian, Jim Woodman has been involved with the Web since 1995. He has worked for such diverse institutions as Harvard University, Boston College, the Boston Athenæum, and Fidelity Investments. With MAs in Anthropology and

Library Science Jim understands technology and has the experience to share with his clients the full capabilities of the Web.

Christopher Muro

CMS/PHP/MySQL Developer. Christopher has extensive programming experience dating back to 1994 with a hospitality reservation booking/management web application. Since then he has been involved with large programming efforts for Fortune 500 companies, such as customized CEO dashboards utilizing AJAX to integrate cross business real-time visibility from multiple databases, as well as smaller individual projects. Christopher primarily develops in the core LAMP stack

Yujin Asai

Web Producer/Designer. Yujin has established comprehensive web solutions for variety of clients including various Broadway and Off-Broadway productions, Columbia University, Interep, and other corporate, architectural, and retail clients. He has also designed and developed solutions such as marketing websites, intranets, content management/publishing systems, online marketing, and web/email hosting. Yujin is the true "Swiss Army Knife" of Web design and development. Yujin holds a BA in Architecture from Carnegie Mellon University.

6. Authorization to Proceed

The signature below authorizes Clearpeak Interactive, Inc to begin the services described above and indicates your agreement to process and pay the invoices associated with these services.

By Blackstone Library

_____   _____
Authorized Signature   Date

_____
Name

_____
Title

By Clearpeak Interactive, Inc

_____   _____
Authorized Signature   Date

_____
Name

_____
Title

7. Recent Work by Clearpeak

Gladys E. Kelly Public Library
https://gladyskellylibrary.org
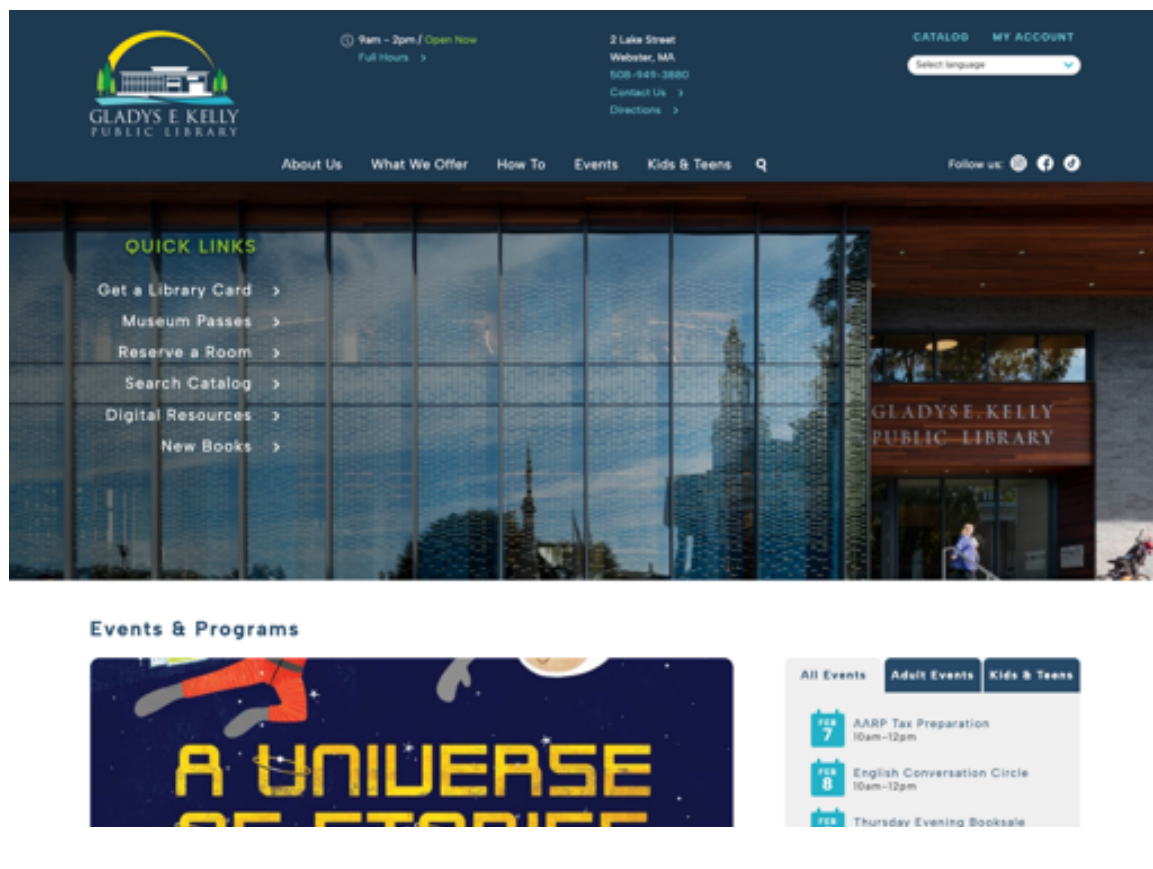
Our Role: IA, Visual Design, Responsive Coding, CMS

Forbush Memorial Library
www.forbushlibrary.org

Our Role: IA, Visual Design, Responsive Coding, CMS
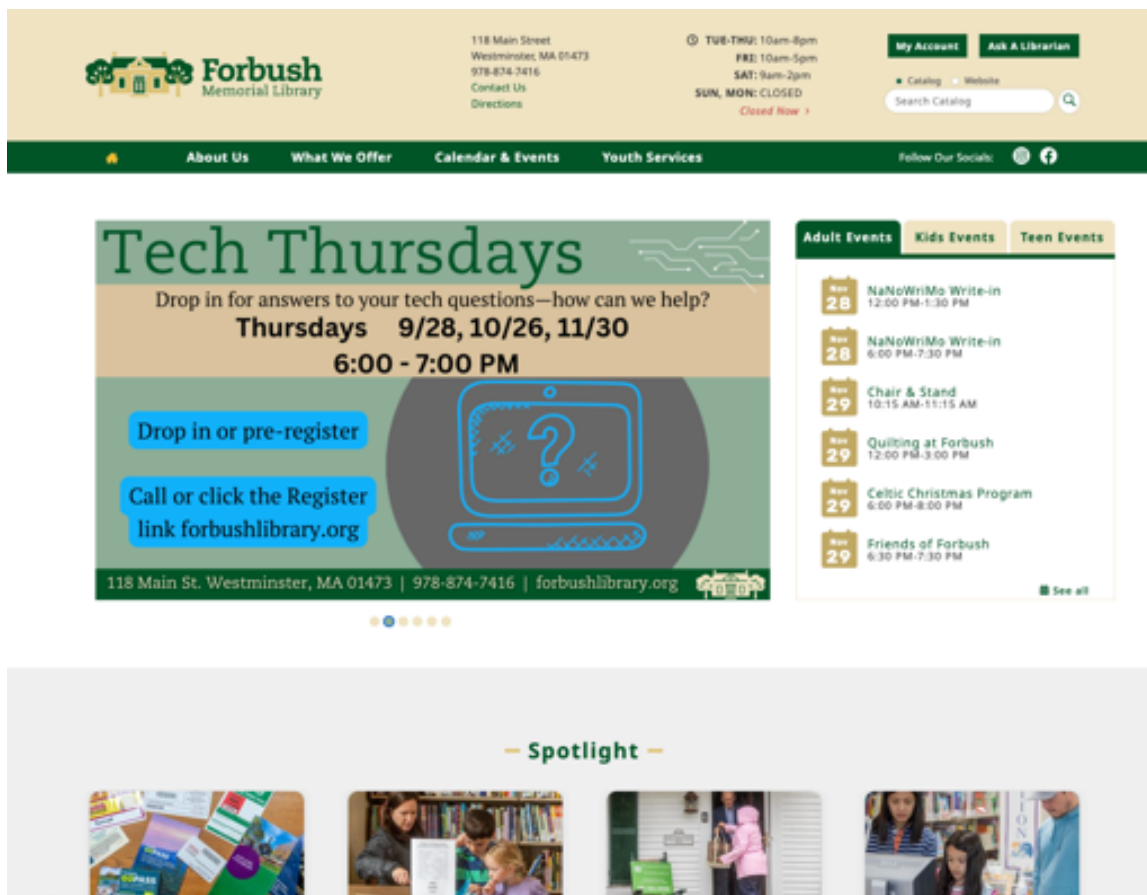
Lawrence Library

www.lawrencelibrary.org

Our Role: IA, Visual Design, Responsive Coding, CMS
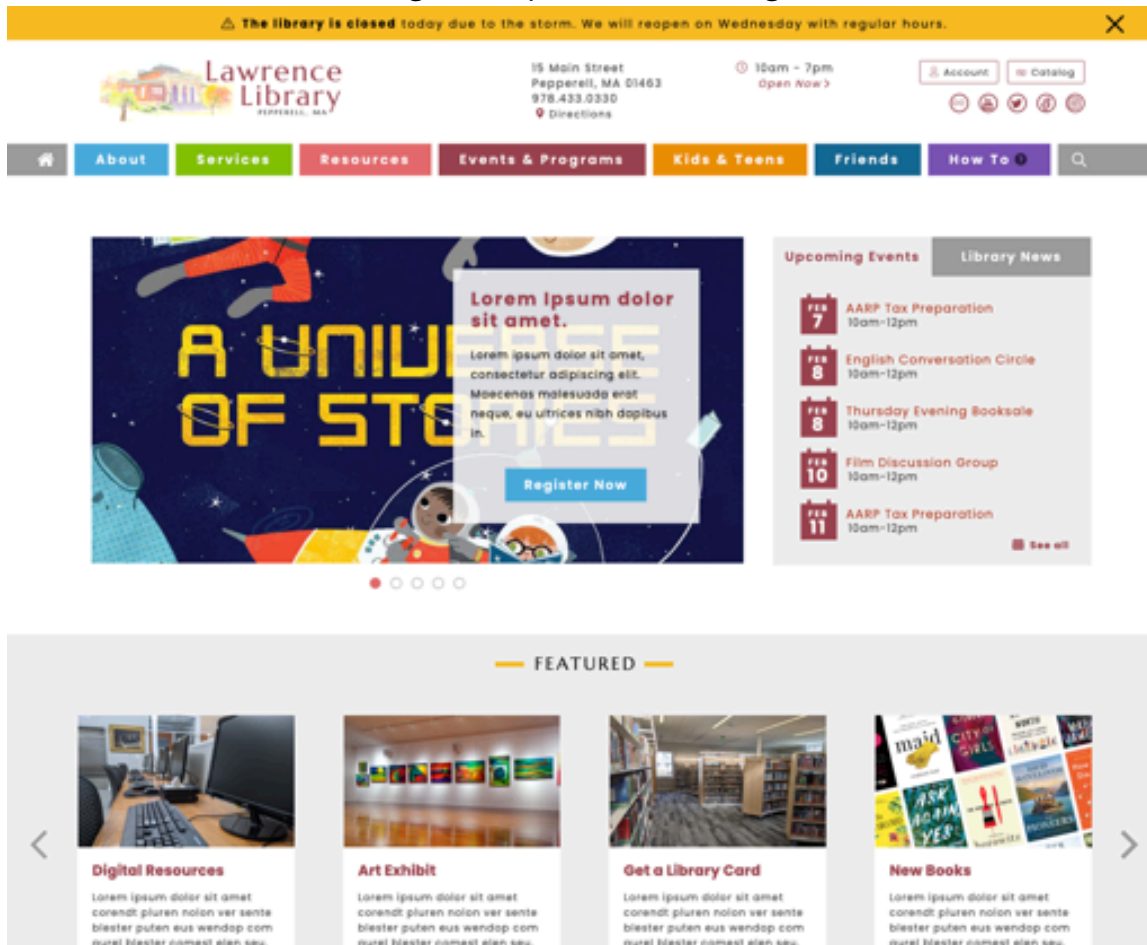
Leominster Public Library
www.leominsterlibrary.org

Our Role: IA, Visual Design, Responsive Coding, CMS

Edgartown Public Library

https://edgartownlibrary.org

Our Role: IA, Visual Design, Responsive Coding, CMS
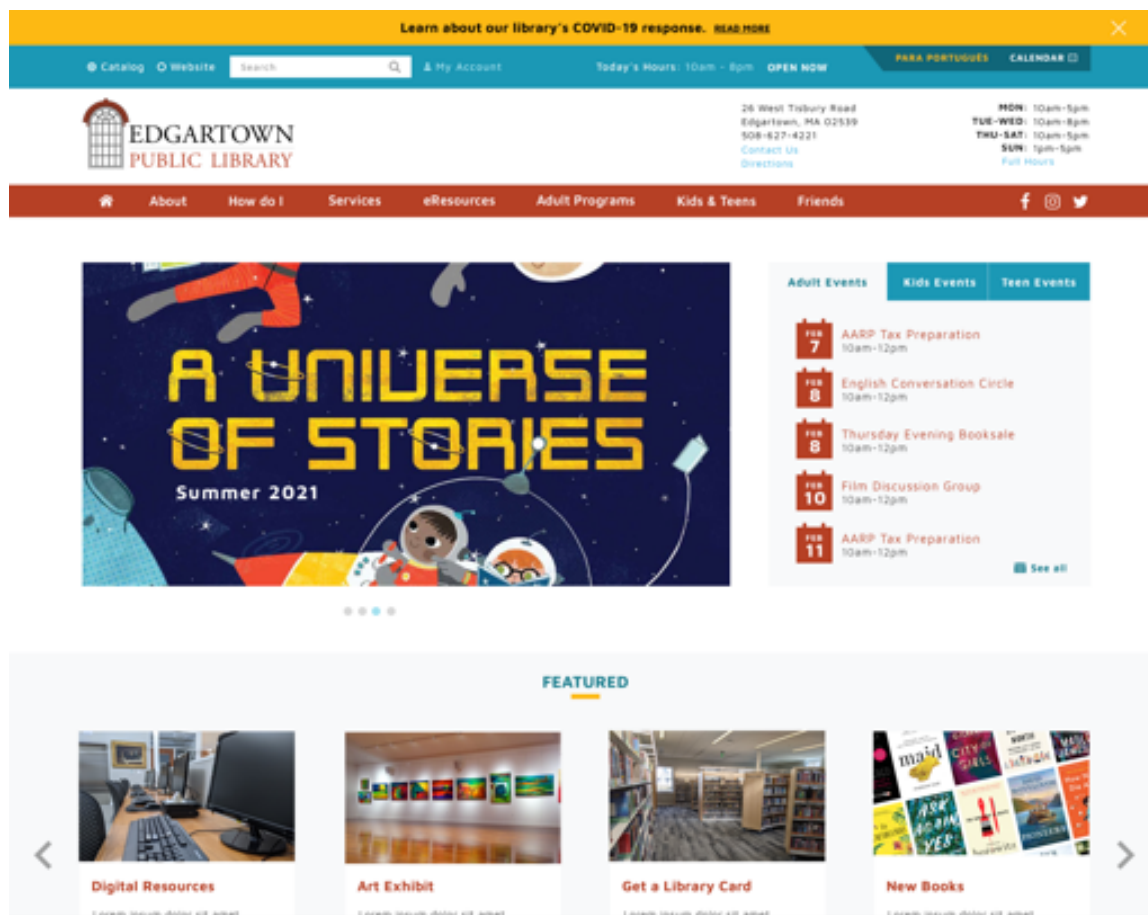
Groton Public Library
gpl.org

Our Role: IA, Visual Design, Responsive Coding, CMS
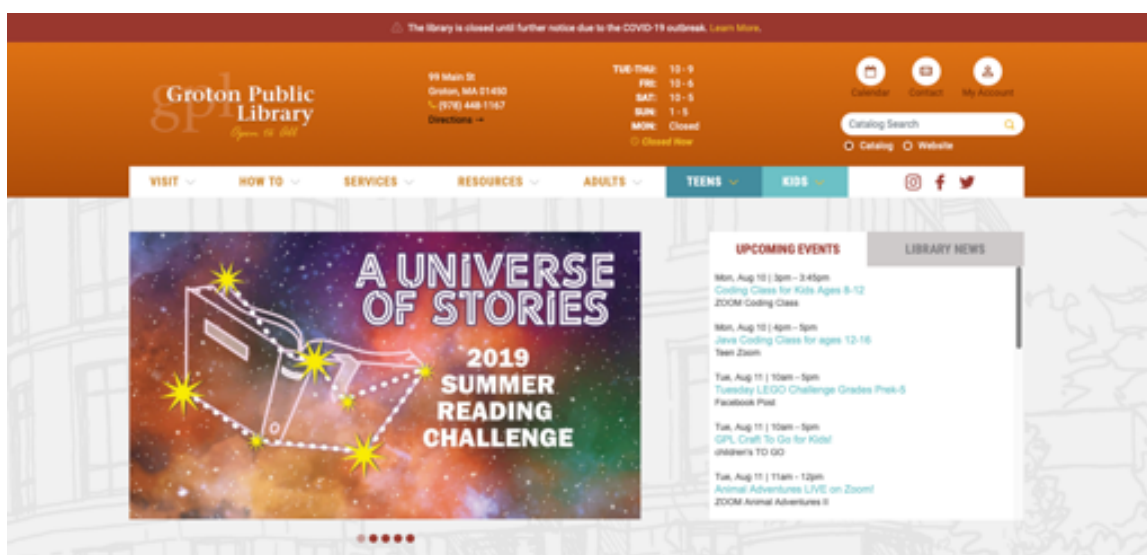
Westwood Public Library
www.westwoodlibrary.org

Our Role: IA, Visual Design, Responsive Coding, CMS
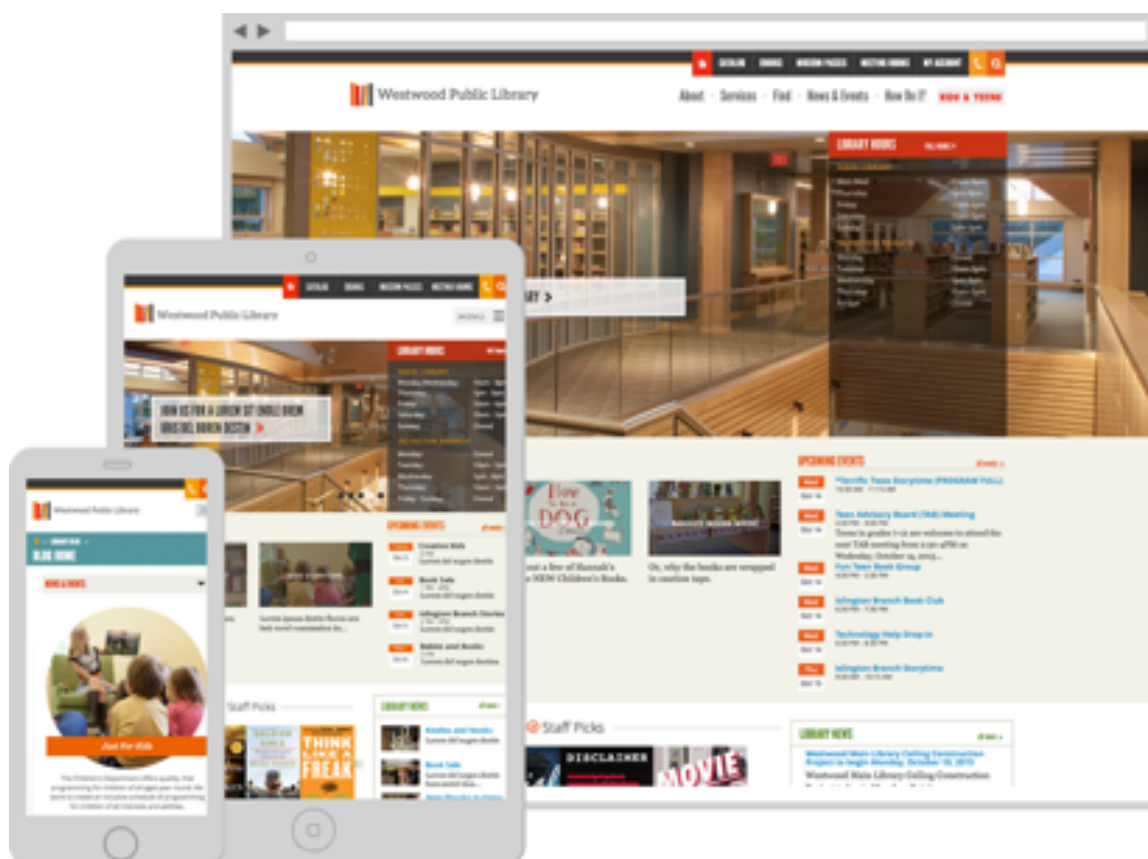
Sherborn Library

www.sherbornlibrary.org

Our Role: IA, Visual Design, Responsive Coding, CMS

Worcester Talking Book Library
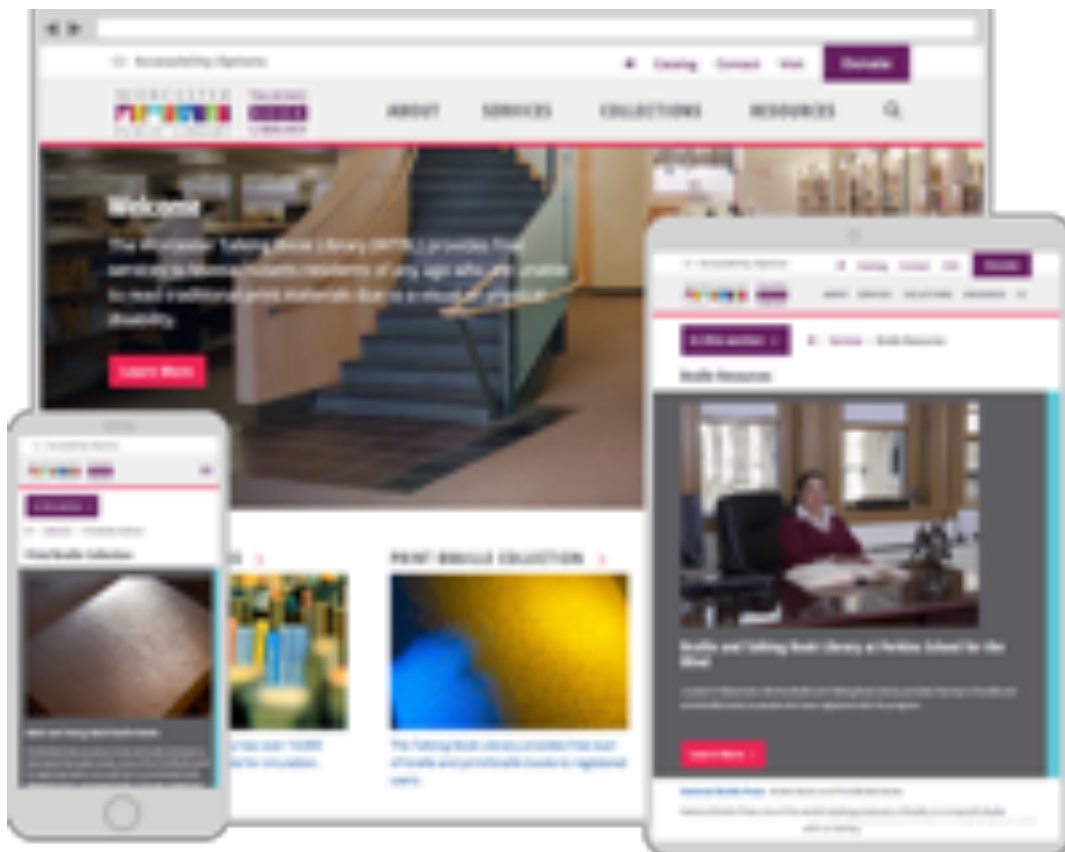https://talkingbook.myBPL.org

Our Role: IA, Visual Design, Responsive Coding, CMS