

LIGHTMAKER ●●●

# **Bay Area Air Quality Management District Strategic Roadmap**

**Version: 1.4**

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# 1.0 Strategic Roadmap

## Document Overview

The Strategic Roadmap document has been created by Lightmaker in order to define a plan for the Bay Area Air Quality Management District website redesign. Full website delivery can only commence following finalized Statement of Work document sign-offs and any necessary subsequent scope meeting between BAAQMD and the web implementation project team.

A high-level project timeline is included in this document. The timeline relates directly to the proposed features at this date, and will change depending on what scope items BAAQMD decides to include in the redesign project. Lightmaker will issue further documentation to support this and will discuss implications and solutions with BAAQMD.

## Project Overview

Bay Area Air Quality Management District is the public agency entrusted with regulating stationary sources of air pollution in the nine counties that surround San Francisco Bay: Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, southwestern Solano, and southern Sonoma counties.

Lightmaker has been engaged to work closely with Bay Area Air Quality Management District to envision and produce a Strategic Roadmap to develop a website with a revamped user experience and user flow and experience that focuses on conversion.

The Strategic Roadmap considers the following:

- New user experience and design for [www.baaqmd.gov](http://www.baaqmd.gov)
- New design and style guides
- Responsive or mobile design for enhanced mobile viewing of the website
- A Content Strategy to that will help ensure that the content vision of BAAQMD will become a reality
- Updated sitemap that corresponds with a content strategy designed to enhance the usability of the website
- Cutting-edge features to encourage user interactivity and engagement with the website
- A preliminary budget and implementation guide to be finalized with the chosen deliverables

### 1.1.1 Project Objectives

This Strategic Roadmap recommends a website redesign with the following objectives:

- To develop a best of breed site with strong user experience at all touch points (web and mobile web for smartphones and tablets).
- To encourage more conversions from existing users, as well as to attract a new users with engaging features and information.

- To drive increased conversions at all digital channels including BAAQMD’s primary properties, social channels and mobile touch points.
- To devise a short, intermediate and long term roadmap to continue to improve and enhance the user experience.

## 2.0 Strategic Overview

As encapsulated in the overall introduction to this document, there are several strategic initiatives that are covered within this document that are to be explored and resolved throughout the course of the web redesign engagement.

### 2.1 User Engagement

Engaging content and clean navigational structure will help users easily and quickly find the information they are looking for while simultaneously educating them about the breadth of BAAQMD services and the impact of clean air issues on individuals, communities, and the world.

### 2.2 Content Strategy

At the core of this initiative, existing and new content must adhere to a strong taxonomy in order to maximize site performance in terms content delivery and deeper engagement of users.

## 3.0 Proposed Features

As a result of extensive audits on the existing BAAQMD website, Lightmaker has gained invaluable insight into what works and what doesn’t work on the BAAQMD website... both in terms of functionality, and in terms of the user experience. Lightmaker’s insight has prompted us to recommend the following Features for the redesigned website.

In this model, we recommend that BAAQMD implements Priority1-2 items as recommended. Priority 3-4 items can be opted for depending on budget.

### 3.1 Priority 1 Items

#### 3.1.1 Rearchitect the Website

**Discovery:** Includes content editor interviews, focus group(s), pre-project planning and scoping.

**Project Planning:** Establish the plan for the project, create sitemap, and assign teams.

**Concepts:** Create one website concept for the homepage and one secondary page. Include two rounds of revisions.

**Design:** Create five site templates from the chosen concept. Additionally, 40 hours of "design on demand" time is included for design time needed during the project, to create special graphics and design elements called for while building the website. It is at the discretion of the project leads when and how to use these additional hours.

**Wireframes:** Produce Wireframes for major sections of the website. Assume 20 wireframes and two rounds of revisions.

**Front-end Development:** Build designed templates into the CMS. Build the navigation and major blocks of the website.

**SiteCore Development:** Develop blocks and templates within SiteCore.

**Website Assembly:** Tie together all elements of the site to match the sitemap and wireframes. Ensure that content placement is thorough and accurate.

### **3.1.2 Mobile/Responsive Design**

Use responsive or mobile design methodologies for the site(s) to support mobile design on limited site map pages. Define sitemap pages to be included in the responsive/mobile design, and architect, design and develop the mobile/responsive version.

## **3.2 Priority 2 Items**

### **3.2.1 Content Migration and Entry Support**

Develop a plan for content migration and entry based on the new site map. Define which content from the old site needs to be migrated over and which content needs to be newly created and entered into the site. Provide basic training on Sitecore to the client, with best practices for content entry, tagging, etc.. This estimate is based on the current understanding of the BAAQMD content.

### **3.2.2 Tracking Software Upgrade**

Upgrade Google Analytics to the latest asynchronous tracking code. Modify so that one profile tracks all of the traffic across the site with filters to display which sub-domain the page originates from and to have separate filtered profiles to track each individual sub-domain. This will provide insight into the sub-domain engagement and provide information of the total visits and engagement across the entire site and solve the self-referral issue. Set goals that align with Business Objectives in Google Analytics to track important actions on the website. Install heat tracking software for better insight into user engagement with the website.

### **3.2.3 Social Sharing Integration**

Enable Social Sharing features so that users can share content they find interesting and/or important.

### **3.2.4 Widgets Integration**

BAAQMD currently uses widgets to serve key content to users. Include these widgets in the redeveloped sitemap so as to capitalize on the work that BAAQMD has already done in this area.

## **3.3 Priority 3 Items**

### **3.3.1 Translated Microsites**

Create three translated/localized microsites with up to 20 key sitemap pages each. Includes tribe-specific imagery, and content. Translation services are not provided. Content entry to be provided by the translation services. Recommended languages: Spanish, Chinese, and one additional language TBD.

### **3.3.2 Prioritized Content**

Implement functionality on key sitemap pages that allows popular content to bubble to the top of the page. This will allow users to decide what is the most important content on key pages. Strategically incorporate this functionality so that key BAAQMD objectives are met.

### **3.3.3 Community-Specific Pages**

An important aspect of the BAAQMD website will be the ability of users from different communities to engage with content that relates specifically to their local community. These community pages will be designed in such a way to encourage interactivity and social sharing among community members. Includes 9 jurisdictions.

### **3.3.4 Events Calendar**

Create an events calendar which allows all events to be published and visible to the public. The calendar should have links to pages of information regarding listed District activities. A snapshot of the current month's calendar can be exported in iCal format for import into supporting platforms: Google Calendar, iCal, ICS, Outlook and Yahoo.

### **3.3.5 Enhanced On-Site Search**

Enhance the On-Site Search to that it is more user-friendly and easy to use. Utilize grouping and filter events.

### 3.3.6 Social Feeds and User Generated Content

The website will encourage visitors to discuss subjects such as air quality levels, environment, climate and public health by providing visitors with the functionality to produce content. Some examples of this would be to add comments to articles / content pages, allow visitors to participate in polls and also feed information from social networks which match the important keywords surrounding this subject. The actual UGC interfaces will be decided in the Discovery and Creative phases of the redesign project.

## 3.4 Priority 4 Items

### 3.4.1 One Major Interactive Element

Design and develop one major interactive element for the website that will engage BAAQMD users and can be used for educational and/or entertainment reasons.

#### THE IDEA

*To produce an informative piece that allows users to interact and create scenarios that help them understand the powerful impact small changes in everyday life can have.*

#### HOW WE DO IT

The informative piece would be based off of scenarios. These scenarios can work off a number of factors. The scenario would look something like this;

**Imagine if \_\_\_% of people \_\_\_\_\_, this would be the impact over \_\_\_ years.**

To put it in real terms, Imagine if **80%** of people **drove an EV Car**, this would be the impact over **5 Years**. The user could also select past years. This way the user could see the past levels of air quality and how the scenario would have impacted that time period. Once you have created a scenario, the user would be asked to share this scenario with their friends. Once shared, friends of that user would be asked to create their own scenarios.

When you are viewing your scenario, you will be able to scroll through the years that you have selected and see an animation of how the air quality is affected.

Besides just creating scenarios, we can show projections of what it would be like to do nothing as well as the current state of air quality in a specific area.

### 3.4.2 Internal Social Media Platform

Implement an internal social network that BAAQMD employees and contractors can use to communicate and collaborate. This social network will become an integral part of the BAAQMD culture, and will be an invaluable tool for the organization. 3rd party costs need to be considered, and we recommend a Discovery Budget to research implementation criteria and cost.

## 4.0 Production Schedule

A detailed project schedule will be delivered with a signed scope. Please refer to that document regarding any key dates, milestones and deliverables. Any delays on milestones and signoffs outlined within that document may result in delays of corresponding deadlines.

Below is a quick summary of major billing milestones listed in the project plan.

Item/Milestone	Percentage	Term
Deposit to Start Work	30%	Upon Receipt
Approval of Statement of Work, Wireframes and Creative	30%	Net 15
BETA Site Delivery and Front End Developments for Reservations	30%	Net 15
Launch of Full Site (with approved Acceptance Documentation)	10%	Net 15

### 3.1 Major Deliverables

This section outlines major deliverables to be provided in support of the launch of the BAAQMD site.

#### 4.1.1 General Deliverables Schedule/Overview

Item	Estimated Date	Overview
Discovery and Planning	12/2012	Once the contract is signed, begin to lay the foundational elements of the website redesign project. This phase will be used to explore the overall requirements around the integration and any other business needs.
Scope of Work Document,		The Scope of Work (this document) outlines

Content Strategy	1/2013	the overall scope of the project and it is important to guide future efforts in design and development as it outlines assumed scope, areas for further definition and the roles and responsibilities. The Content Strategy will help ensure that the content vision of BAAQMD will become a reality.
Project Plan	1/2013	This will be a timeline built which will outline the major schedule for the project. This is a living deliverable which will be amended as the project evolves but it will outline key dates for major deliverables, client responsibilities, etc..
Feature Matrix	1/2013 to agreements	Documents all features from original scope and discovery meetings and starts to detail out the requirements of each feature making sure key stakeholders are involved.

<b>User Experience</b>		
Wireframes (Desktop & Mobile)	3/2013	<p>User Experience Deliverables to include:</p> <ul style="list-style-type: none"> <li>• Major Use Cases and Personas</li> <li>• User Flows</li> <li>• Finalized Site Maps</li> <li>• User Testing Workshops</li> <li>• Core Site Wireframes Set                             <ul style="list-style-type: none"> <li>○ Core Content Site – Approximately 5 Templates and Forms (Responsive or Mobile Design)</li> </ul> </li> </ul>
<b>Design</b>		
Concept Design	4/2013	<p>Concept Design to include:</p> <ul style="list-style-type: none"> <li>• Creative Brief</li> <li>• Core Site Design Concept (Including 2 Rounds of Revisions)                             <ul style="list-style-type: none"> <li>○ Home Page</li> <li>○ Interior Landing Page</li> </ul> </li> </ul>

Design Production	5/2013	Production design of interior templates and critical design pieces.
<b>Production</b>		
Front End Development	6/2013	Based on the approved design templates, front end development will start and include the following: <ul style="list-style-type: none"> <li>• Front end development for mobile/responsive design</li> <li>• Front end development of the core website</li> </ul>
Back End Development	7/2013	The backend development will consist of SiteCore integration using the approved templates and delivery steps will include: <ul style="list-style-type: none"> <li>• Functional Requirements Brief (annotated wireframes)</li> <li>• Base Analytics Plan</li> <li>• Content Migration Plan and Checklist</li> <li>• BETA Version of Core Site with SiteCore</li> </ul>
Quality Assurance	10/2013	Following development, check the BAAQMD site and will do the following: <ul style="list-style-type: none"> <li>• QA Test Plan</li> <li>• CMS Training (Virtual Session) and Basic Documentation</li> </ul>
Assess and Deploy	11/2013	Once development and QA is complete, assess going live. In general, steps will include: <ul style="list-style-type: none"> <li>• Launch Plan</li> <li>• Final Version of Core Site with CMS</li> <li>• Launch</li> <li>• Post Launch Support (bug fixes for 90 days)</li> </ul>
Ongoing Marketing, SEO, SEM	Ongoing	Once the website is launched, work with BAAQMD to create and deploy ongoing marketing initiatives and website

		maintenance to support the new website.
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## 5.0 Client Assets/Requirements

The following outlines all major asset needs and requirements needed in order to finalize the website within the timelines listed in this document.

### 5.1.1 Content/Assets

The following assets are needed in order to redesign the BAAQMD site:

- Site imagery, logo, etc.
- All content to be included in the website

## 6.0 Discovery and Planning

Work with BAAQMD during an initial discovery phase to explore the overall requirements for integration and any other business needs. Activities during this phase will focus on an exploration of the existing site and business needs to further solidify the overall scope.

- Discovery Workshops and Stakeholder Interviews (Onsite)
- Requirements Gathering
- Project Planning and Final Scoping

## 7.0 User Experience and Creative Specifications

Focus effort around creating strong web and mobile web (smartphone and tablet) experiences for the core [www.baaqmd.gov](http://www.baaqmd.gov) website. Utilize mobile design methodologies to create the optimal user experience across key browsers. This effort will focus on the following:

- Use Case Development and User Persona Development
- Wireframe Development and User Experience Development
- Concept Design

## 8.0 Creative Brief

Create a creative brief to help lead the UX and creative look and feel for the site. It will address the following questions:

1. What consumer problem must the website solve?
2. What is the objective of the website?
3. What is the most important promise, benefit and/or offer?
4. What facts support this promise, benefit and/or offer?
5. Who are we talking to?
6. Who or what are we competing with?
7. What is the tone, how should the website feel?
8. Are there any mandates we must account for?
9. What taglines (if any) are there?

## 9.0 Development Specifications

The project components will be developed based on the approved design. Functional reviews will be conducted to ensure branding and marketing objectives are met. Any new functionality outside of the current scope will be considered out of scope and require additional funds presented in a change order.

### 9.1.1 Components and Deliverables

The website agency will be responsible for the collaborative envisioning, design and frontend development of the platform. In addition to the frontend development, it will implement the content portions of the site into SiteCore.

In terms of major end deliverables, the website agency will build and deploy a new user experience for the content area of the site leveraging the existing SiteCore build. Generally, this portion of the site will focus on the following key areas:

- Content Management System (Sitecore)
- Major Sections of the Site (approximately 5 templates)
- Search Engine Friendliness - The site will be built using key best practices to ensure that site content is accessible and able to be indexed by search engines.
- Analytics Implementation (Google Analytics)

### 9.1.2 Content Migration

Develop a plan for migration of content. This plan will focus primarily upon the primary content site content.

## 10.0 Technical Guidelines

Item	Description
Viewing optimization for web	1024 X 768
Client-side connectivity optimization (Desktop)	Optimized for broadband connectivity
Client-side connectivity optimization (Mobile)	Optimized for 3G connectivity
Web browsers optimization	Internet Explorer – Most recent 3 versions at time of testing Firefox – Most recent version at time of testing Google Chrome – Most recent version at time of testing Safari – Most recent version at time of testing
Mobile web browser optimization	Major Smartphones and Tablets (primarily targeting, iOS and Android).
Client-side development languages	XHTML built to W3C Specifications, Javascript, jQuery, MooTools
Server-side development languages	.NET
Content management platform	Sitecore CMS
Video Platform	Granicus, iTunes, YouTube,
Social APIs	TBD in Discovery
Web Analytics	Google Analytics
Media player formats	Granicus, iTunes
Database	TBD

## 11.0 QA Plan

Define and execute an internal QA plan that checks the site for bugs in the different desktop browsers mentioned in the technical guidelines. An internal bug tracking system will be used to track all bugs found internally and by the client.

## 12.0 Launch Plan

Share a launch plan with BAAQMD as the “assess and deploy” phase draws near. This will include all required steps necessary, from both parties, in order to launch the redesign of the BAAQMD site.

## 13.0 Post Launch Support

Implement a 90 day bug policy to support the new components post launch for the first 90 days. Guarantee to fix and remedy all bugs found during this period from the day of launch to day 90. After 90 days, continue to support the site, but from a maintenance perspective. A bug is defined as anything designed, or any functionality, not working as it was intended to and agreed upon in the SOW. Any new updates or enhancements made to the site post launch are not included under this clause.

## 14.0 Roles and Responsibilities

The below tables detail the team(s) members for the web agency who will take part of the project with their key responsibilities to ensure the smooth delivery of the project.

### Web Agency Team

Role	Team member/s	Responsibility
Commercial Director	TBD	<ul style="list-style-type: none"> <li>• Liaise with the BAAQMD team if project is predicted to go into exception</li> <li>• Liaise with the BAAQMD team on any commercial discussions</li> <li>• Responsible for representing BAAQMD’s interests and working with the team(s) to develop and manage strategy and roadmap</li> <li>• Act as point of contact if required</li> </ul>
Project Manager	TBD	<ul style="list-style-type: none"> <li>• Act as the primary contact for project queries</li> <li>• Produce Scope of Work document and secure sign-off from BAAQMD</li> <li>• Manage project timeline and agree delivery/launch date with BAAQMD</li> </ul>

		<ul style="list-style-type: none"> <li>• Monitor project progress against timeline and agreed budget</li> <li>• Raise any possible changes to timeline and budget to the Commercial Director and BAAQMD’s managing personnel</li> <li>• Ensure deliverables meet quality criteria</li> <li>• Mediate between Commercial Director and BAAQMD if project is predicted to go into exception</li> <li>• Liaise with the BAAQMD team if project is needs to be escalated for any reason</li> <li>• Act as point of contact if required</li> <li>• Maintain risks and issues log and discuss actions with BAAQMD</li> <li>• Provide weekly status reports to BAAQMD and project group</li> </ul>
Business Analyst	TBD	<ul style="list-style-type: none"> <li>• Understand BAAQMD’s strategic approach</li> <li>• Discovery workshop prep</li> <li>• Lead user testing groups</li> <li>• In person meetings</li> <li>• Research, documentation of requirements and revisions</li> <li>• Daily/weekly coordination (weeks starting after discovery workshop)</li> <li>• Project checkpoints/reviews (following completion of discovery)</li> </ul>
Lead Creative	TBD	<ul style="list-style-type: none"> <li>• Understand BAAQMD’s creative approach</li> <li>• Lead the UX and overall design</li> <li>• Attend creative brainstorming sessions and presentations as necessary</li> </ul>
Interface Designer	TBD	<ul style="list-style-type: none"> <li>• Understand BAAQMD’s creative approach</li> <li>• Responsible for user interface and design</li> <li>• Presentation of creative to BAAQMD</li> </ul>
Front End Developer	TBD	<ul style="list-style-type: none"> <li>• Understand BAAQMD’s creative and technical approach</li> <li>• “Cut out” Photoshop layers including buttons and layers to be web-friendly (k-size, quality, etc.)</li> <li>• Build out templates</li> <li>•</li> </ul>
Back End Developer	TBD	<ul style="list-style-type: none"> <li>• Understand BAAQMD’s technical approach</li> <li>• CMS implementation of front end development</li> </ul>
Systems Admin	TBD	<ul style="list-style-type: none"> <li>• Prepare live environment</li> <li>• Provide technical direction where needed</li> <li>• Launch Site</li> </ul>

## 15.0 Project Management

A good Web management process is built around constant communication with the client, documentation for all key components and stages, and client sign-off at each milestone to ensure that the project delivery is smooth and problem free.

### Communication Plan

This communication plan details how communication will be conducted during the lifespan of the project. It details what will be communicated, how and when and to whom. Communication can be conducted via email, and online project management system, telephone and/or in person.

#### 15.1.1 Project Timeline

This will be developed by the Project Manager. It will contain all the project stages and detail their planned start and end dates. This is typically an internal document broken down into each task required for external deliverables to be met. On a weekly basis, progress of all deliverables against this plan will be monitored and recorded by the project manager and reported back to BAAQMD.

#### 15.1.2 Regular Project Progress Updates

There will be three different types of project progress updates:

Progress reports created and distributed by the Project Manager. The report will comprise of the following:

- Any high priority highlights of progress (e.g. schedule changes, SOW alterations)
- A snapshot of the project timeline for the previous and coming weeks, and any updates to it throughout the life of the project.
- The status of any activity detailed in the timeline.
- A summary of any risks and issues, as they arise, which are open and need resolving.
- Progress reporting meetings held to describe the status of the project to the project board.
- Reviews at key points of development with the whole project board.

#### 15.1.3 Frequency and Format

The following describes the actual communication plan for the project:

- The project timeline will be developed and available for sign-off. Should changes be made to this document an updated version will also be made available. This will be in .pdf format, which can be opened with Adobe Acrobat Reader.
- Agendas will be provided before the start of every scheduled meeting.

- Weekly status reports will be available every week.
- Meetings will need to be scheduled to further define the project scope with BAAQMD, and then with the internal teams to timeline the changes.
- Risks and issues will be reported and logged on an ongoing basis and available for BAAQMD review in the weekly status report. A tally of all risks and issues can also be made available for BAAQMD should this be required.

#### **15.1.4 Quality Criteria**

Prior to the releases of the project launches, ensure the following checks have taken place and passed against all designs to be delivered.

##### **Usability**

- Layout of pages is easily viewed, understood and navigable
- Functions have been checked against the creative design

##### **Accessibility**

- The site conforms to accessibility guidelines

##### **Visual design**

- Design quality of all the pages is excellent
- Design approach and quality is consistent across all pages
- Design of all pages matches the agreed look and feel

#### **15.1.5 Acceptance Criteria**

It is important at the start of the project to define what criteria the BAAQMD website will need to comply with in order to be accepted by BAAQMD. This will be fully outlined in the scoping meetings but may include the following acceptance criteria both in terms of technical stability and visual appeal:

- Users are able to access the website easily
- The website reflects BAAQMD's personality

#### **15.1.6 Change Control and Additional Development Costs**

In order to ensure the project remains on schedule, it is essential that key documentation is signed off by BAAQMD on the dates identified in the timeline. These key documents all help to define a common understanding of what the site will contain, how it will be achieved and how it will look, before work begins at full speed and time and money are potentially wasted.

These key documents are:

- **Scope of Work (SOW) document** – this will define the project approach and controls and briefly describe the deliverables.
- **Sitemap & Wireframes** – these will outline the key templates to be used for the site. Every page will need to use one of these templates based on the sitemap.
- **Concept Design** – Concept design for approval will be presented before designing out all interior pages or entering into technical development. BAAQMD will have to review markings in the wireframes to see what elements are not currently within scope.

The main reason for sign-off is so that development can continue as planned, without the risk of major changes needing to be made at a later date which affects the original timescale and budget.

Signing off a document does not mean that changes cannot be made to it in the future. If changes are required to a document or part of the site they may well be possible within the defined budget and timescales, but this will need to be assessed on a case by case basis.

When a change requirement has been identified, this should be raised directly to your project manager. The implications of this change will then be assessed (for example any knock-on technical or design effects; budget; timeline) and discussed with BAAQMD. If the benefits of the change are seen to outweigh any implications, then the change will be accepted and incorporated into the project. Any changes to budget or timescale will be made and communicated. If however the change requested requires additional work, which would have a negative effect on both timelines and budget this change would be subject to formal Change Request procedures.

## 16.0 Assumptions & Dependencies

In producing a Scope of Work document, the following **assumptions** and **dependencies** have been made:

- That any 3<sup>rd</sup> party requirements will be finalized during the course of the discovery phase to determine the final strategy and implementation plan. Costs for these have not been included in this document. All 3<sup>rd</sup> party contracts and costs will be managed under separate header and either contracted directly with Client or through the website agency. For the avoidance of doubt, the website agency shall not have the power or authority to bind Client or its affiliates in contract or to make any promises on their behalf.
- The design budget and frontend development budget for the core content (www.baaqmd.gov) website has been based off of an assumption of 5 content templates and simple forms.
- That SiteCore will be utilized as the core CMS for the site.
- That Client will be responsible for all site content and assets needed to design the site and to complete necessary content/data migration.
- That Client will be needed to assist in the data and content migration process to align existing site content with the new site taxonomy and structure (i.e. content tagging).
- Ongoing support, hosting and/or maintenance costs and levels of effort will be determined as soon as possible during the course of the initial project and will be covered under a separate project exhibit.