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INTRODUCTION

The City of Grants Pass issues this Request for Proposal in order to identify a quality vendor to upgrade, redesign and host our current websites, which are currently maintained within the same Content Management System. As part of this project, we would like to separate the sites and provide each with its own CMS.

- City of Grants Pass municipal website (www.grantspassoregon.gov)
- Grants Pass Tourism website (www.visitgrantspass.org)

The City of Grants Pass seeks a company to provide the features listed in this RFP and be flexible enough to implement features over time, as needed, due to budgetary constraints. The company should provide user documentation and be able to assist with training City employees on the new system so they may continue to update and maintain the site.

The City's current websites at <http://www.grantspassoregon.gov> and <http://www.visitgrantspass.org> are built on the Vision Internet CMS, and hosted on Vision Internet servers. The current site was launched in January 2006. Minor upgrades in components have been made in the interim. No significant changes to the underlying structure have been made.

City of Grants Pass:

<http://www.grantspassoregon.gov> – external sites/public portals/data to be connected to this website are:

- Online Bill Payment (bank payment linked on website, refined online function project currently in progress)
- USGS Water data (currently livestreamed on website see: Current River information on this page: <https://www.grantspassoregon.gov/Index.aspx?page=557>) (scripted real-time data retrieval)
- Online Permitting (project currently in progress)
- GRANTSPASSFIREWISE.ORG

Grants Pass Tourism:

<http://www.visitgrantspass.org> –. Minor websites to be integrated into the Tourism site are:

- <http://www.amazingmay.com>
- <http://www.magicalmurals.com>
- <http://www.ag2arts.org>

Art Along the Rogue (<http://www.artalongtherogue.com>). Tourism desires a unique site for Art Along the Rogue which should look completely different than the Tourism site and have its own picture library and own fan base. It is desirable do this within the Tourism CMS if possible.

PROJECT INFORMATION

SCOPE OF RFP

This RFP contains administrative and procedural information concerning instructions for preparation and submittal of the proposal, an explanation of how the proposal will be evaluated, and conditions which will be included in any contract which may be awarded as a result of the RFP.

REQUIRED INFORMATION

Proposals shall include, as a minimum, the following items:

- a) The legal name, address and taxpayer ID number of the proposer and the name of the person(s) authorized to represent the proposer in negotiating and signing any contract which may result from the proposal.
- b) A statement that the Proposal includes all terms and conditions of the RFP.
- c) A statement of qualifications.

All proposals shall be placed in a sealed envelope, which is clearly marked "RFP - WEBSITE DESIGN AND DEVELOPMENT." Vendors submitting via email must also submit a hard copy to arrive no later than 5PM on Wednesday, November 20, 2013.

SUBMITTAL PROCEDURE AND DEADLINE

Submit your Proposal in an envelope marked "RFP - WEBSITE DESIGN AND DEVELOPMENT" to:

David Reeves,
Assistant City Manager, City of Grants Pass
101 NW A Street
Grants Pass, OR 97526

dreeves@grantspassoregon.gov

DEADLINE

Proposals must be received by 5PM Wednesday, November 20, 2013 as either hard copy (1) to the specified address or emailed in PDF format. Vendors choosing to submit via email must also submit a hard copy to arrive no later than 5PM on Wednesday, November 20, 2013

Responses delivered later will not be accepted. The City of Grants Pass is not responsible for delays in delivery.

ADDENDA

It is the sole responsibility of the Supplier to learn of Addendum, if any. The City of Grants Pass accepts no responsibility or liability and will provide no accommodation to bidders who fail to check for addendums and submit inadequate or incorrect responses.

Addenda will be published on the City of Grants Pass website. Supplier can sign up for notifications or view any addenda on the following pages:

- Sign up for e-Notices - <http://www.grantspassoregon.gov/Index.aspx?page=297>
- Requests for Proposals - <http://www.grantspassoregon.gov/Index.aspx?page=346>,

Supplier may also call (541) 450-6000.

PROJECT BUDGET

The current estimate for this project is between \$32,000 - \$57,000 through the end of the fiscal year. Additional funds may be available in the new fiscal year. Bidders are requested to specify any charges for technical support continuing beyond the initial project timeframe.

APPROXIMATE PROJECT TIMELINE

Issue RFP	October 23, 2013
Proposal Due Date	November 20, 2013
Selection Complete	December 18, 2013
Notice to Proceed	December 20, 2013
Project Complete	June 30, 2014

SUBMITTAL CRITERIA

These instructions were developed to aid in proposal development. They also provide for a structured format so reviewers can systematically evaluate several proposals. Each copy of the proposal package must include all of the sections in the order indicated. Attachments should be clearly referenced and identified to facilitate the review process.

RIGHT TO AWARD OR REJECT

All proposals will become part of the City's public record of this matter. This RFP does not commit the City of Grants Pass to award a contract. The City reserves the right to reject any or all proposals and/or to negotiate a contract with one of the proposers. The City of Grants Pass reserves the right to offer the contract to other than the low bidder based on other evaluation criteria.

INCURRING COSTS

The City of Grants Pass accepts no liability for any cost incurred by respondents in the preparation or presentation of proposals.

INQUIRIES

Questions concerning this request for proposals should be submitted in writing to:

Ken Selland, Information Technology Manager

City of Grants Pass
101 NW "A" Street
Grants Pass, OR 97526
kselland@grantspassoregon.gov

EVALUATION CRITERIA

The intent of this RFP is to enable the City of Grants Pass to evaluate vendor experience, qualifications and capabilities for designing and developing new City and Tourism websites. The desired qualifications are outlined below. Responders are to submit a written narrative corresponding to each of these items:

COMPANY PROFILE

1. Number of years in business.
2. Office locations.
3. Demonstrated company financial stability.
4. Size of staff (development vs. support) for similar projects and ability to manage concurrent projects.
5. Type and scope of web projects you typically manage.

MUNICIPAL WEBSITE DESIGN EXPERIENCE

1. Past project performance that is relevant to this project.
2. List municipal clients with their website addresses.
3. If no previous municipal government experience, please explain relevant private sector or non-profit organization website experience.
4. References (Name, phone, address, URL.)
5. Demonstrate the company's ability to deliver projects on-time and within budget.

VENDOR SERVICE CAPABILITIES (DESCRIBE ALL AVAILABLE)

1. Information Architecture.
2. Usability Testing.
3. Branding, SEO, web site marketing and promotion.
4. Web Design and Development.
5. Server Hardware and Software setup and configuration (Content Management System, add-on modules, backend databases, integration with existing systems, etc.)
6. System and physical security.
7. Client Training.
8. Availability of documentation and technical support.
9. Ongoing CMS Maintenance and Support.

TEAM MEMBERS/ROLES

List all personnel to be assigned to this project.

1. Name
2. Title
3. Role (e.g., project management, programming, graphics.)

REQUIRED INFORMATION

1. Summarize your project approach for building the City of Grants Pass and Tourism websites, or the portion of this project you're bidding on. Describe our options for features that could be included in this phase or delayed for latter phases.
2. Include a proposed project schedule.

3. Provide the costs for services. Please include how many hours of time the proposal includes for each part of the project.
4. Include a brief overview of similar projects completed, with costs, staff hours required, overall timeframe, and how your estimates matched up when the project was completed.

PRICING BREAKDOWN

All vendors must provide the proposed pricing broken down in a format similar to the one below:

Item	Description	1st Year Cost	Continuing Annual Costs
	Hosting		
	Software Licensing		
	Implementation Costs		
	Maintenance and Support Fees		
	Custom Development Charges		
	Sub-sites with unique domain names		
	Components/Functionalities itemized list		
	Any other costs (specify)		
	Discounts		
	Total Cost		

SYSTEM DEMONSTRATIONS

Vendors must be able to demonstrate the CMS software during the selection process. A demonstration that allows City staff to use the product hands-on is preferred. The demonstration environment should be as close as practical to the City’s current production environment.

SELECTION

Final selection will be made following review and ranking of the proposals. To assist in making a selection, interviews may be conducted at the discretion of The City of Grants Pass. After selection of a web company by The City of Grants Pass a contract may be negotiated.

PROJECT OVERVIEW

DESCRIPTION

The project is to redesign the City municipal and Tourism websites and replace the Web Content Management system. The City is interested in "cafeteria" style proposals to select features that can be built in this project and others that may be completed in future phases.

PROPOSED BUDGET

\$32,000 – 57,000 (to the end of the fiscal year 6/30/2013)

PROPOSED SCHEDULE

Issue RFP	October 23, 2013
Proposal Due Date	November 20, 2013
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Notice to Proceed	December 20, 2013
Project Complete	June 30, 2014

BACKGROUND

The new websites must be compatible with all current versions of the major browsers (e.g. IE, Chrome, Firefox, Safari), and support older versions (2 – 3 versions back). Approximately a third of the City's website traffic continues to be dial-up connections.

We currently use SiteImprove (www.sitemprove.com) as a Quality Assurance tool to check the sites for broken links and misspellings. It also provides a word list/search capability which has proven useful when we've made terminology changes that impacted the entire site. The new websites would have to be accessible to this tool.

SCOPE OF WORK

We anticipate that budget constraints may prevent us from having all the desired features implemented immediately. We would like vendors to make recommendations and provide flexible options regarding what features can be included in the initial phase, which features could be delayed, and their costs. We are interested in a long-term strategic plan. We would also like suggestions on how City staff could be used most effectively to support the project while keeping our costs down.

Please note the following "wish list" is intended to help scope this project with an eye on building towards the future, but do not let this list limit your recommendations. We are open to feedback and guidance from experienced design and development firms.

We expect the project will involve the following tasks:

1. The vendor will recommend and obtain CMS software that best meets the requirements below, along with any necessary add-on modules to provide desired features. The CMS client will be required to run on existing City-Owned hardware and operating systems. Specifications can be provided if required.
2. Help us evaluate and/or conduct user research to find out what our citizens want on the websites. Due to budget limitations, this is an area where City staff may need to do most of the work, but we are interested in guidance from the vendor on how to do this research most effectively.
3. Develop revised information architecture to reflect the needs of the community and the organization. Usability testing will be conducted to verify the architecture works for our citizens. This testing is another area where we may have to rely on City staff due to the costs, but we are interested in ideas from vendors.
4. The vendor will create new visual designs for the sites, including artwork and customized icons. The City and Tourism websites may have distinctly different designs.
5. Once the visual design and information architecture are in place, the vendor will build out the site, including the re-creation of currently available online forms. Where it makes sense and is cost-effective, some content will be migrated directly from the existing CMS.
6. The vendor will provide training to City staff who can gain experience on the CMS by migrating more of the content. It is essential that the new CMS is easy for our internal publishers to use. Additional training will be provided as-needed to City CMS administrators and network administrators.
7. Once the content is in place and the site has been suitably tested to allow it to go live, the vendor must be available to provide technical support, including maintenance on the CMS and modules. Ongoing training may be an optional element as needed.

WEBSITE / CMS FEATURES

The City and Tourism websites and CMSs must be able to provide as many of the desired features as possible. Budgetary constraints may require this project to be implemented in phases.

TECHNICAL REQUIREMENTS

1. **CMS Platform**—The City prefers a modular CMS solution under active development, which has a large installed base, and an active user community. Include current product roadmap.
2. **Performance and Reliability**—It must be capable of supporting multiple load-balanced front-end servers, and cache content pages, not depending on an “always-on” connection to the backend database. Average page load times will be at least as fast as the current CMS.
3. **Security**—Built-in provisions to block SQL injection attacks, cross-site scripting, and other methods of malicious, unauthorized access, with regular security updates.
4. **Multi-Site Configuration**—Initial setup must provide for multiple public-facing sites on the same hardware for future needs beyond this project.
5. **URL Rewrite**—CMS must have the capability to generate “friendly” URLs without query strings.
6. **Standard HTML/CSS/JavaScript Output**—Standard, valid code output compatible with any standards-compliant browser or device. The core pages and navigation must function without using third-party add-ons or plug-ins. However, plug-ins to deliver video, interactive maps or other specialized content will be considered case-by-case. JavaScript menus, form validation, or other features must be coded so the site still works for users who turn JavaScript off.
7. **Relational Data Design**—The CMS must be capable of creating data relationships between different types of content. For example, information about City Departments would be stored in one content table. Other tables would contain information about city office locations or city programs. Relationships between those tables and the departments table would allow program pages to display information about the department that provides it, or department pages could provide their office locations, while avoiding the duplication of data in many different pages or content types.
8. **Taxonomies**—The ability to organize content in different ways and display the same items on different parts of the site based on different organizational views. For example, any content labeled as a form could be displayed on a central forms page. Forms specific to building construction could also be displayed on pages for that topic.
9. **Content Migration**—We plan a large-scale migration of content from the existing sites.
10. **Code Ownership**—Any custom coding, graphic design, configuration settings or other work products related to the websites’ design and development will be the property of the City of Grants Pass.
11. **Analytics**— Our current Analytics tool, Urchin, was included as a component when our websites were developed. We are looking to upgrade this tool with the one that can deliver the following metrics: total visits, total page views, unique visitors, page views per visit, average visit duration, time on page, bounce rate, new vs. returned visitors, visits per visitor for a given time frame, total number of on-site search queries. In addition, we want to be able to track website usage by devices/browsers/platforms (especially mobile access), origin of traffic by geographic location and website referral. This data should be exportable to Excel. It is also desirable to be able to:
 - set, use and analyze benchmark data.
 - aggregate analytics for more than one website.
12. **Reporting**—Built-in reports, exportable to Excel spreadsheets is highly desirable. These might include reports on content aging, user access, items pending approval, content changes, content inventories, broken links, file uploads, and audit reports showing system usage by groups, departments, or other criteria. We currently use SiteImprove for site-wide spell checking and broken links.
13. **XML site maps**—Auto-generated XML index files that meet the formatting requirements of major search engines.

14. **Newsfeeds**—Publication of articles through newsfeeds (RSS), text messaging (SMS), or other technologies that can be enabled case-by. Also enable publishing RSS feeds from other sites, CitizenObserver, for example.

WEBSITE DESIGN AND FEATURES

PAGES

1. **Flexible Homepage** – The ability to change content, images, and icons on the homepage without compromising the design. Specifically, a content block which would allow the web editors to promote content based on urgency, timeliness and interest of the public. For example, emergency notices, seasonal information, and pages with information on topics being discussed in Council meetings. Photos should be able to be easily swapped out, and must not require a graphic designer to add graphic elements to the individual photos.
2. **Emergency messages**—The ability to quickly and easily insert emergency information on the home page. Authorized, non-technical staff must be able to activate this feature.
3. **Templates** – A series of templates to use for various purposes on the site to maintain consistency of design. For example: department/section homepages, landing pages with the ability to sort links by general topics, pages with images, pages with list of documents, pages with call-out boxes/tables.

CALENDARS

1. **Calendar** – Create City Meetings, community events, holidays, etc. in a central interface and shared across the websites, filtered by subject matter, category, or department.
 - a) Options to display events in a list format or a conventional grid. Events displayed can be filtered based on categories. Categories should be distinguished by color, an icon, or some other means. The order of events can be set so more significant events will appear first.
 - b) Events can be downloaded to desktop calendar programs such as Outlook or added to a user’s personal web-based calendar. Coming events would be published on RSS feeds, organized by category. The ability to push events out through social media platforms would be a plus.
 - c) The ability to control the time range of calendar display (e.g. one week, two weeks).
 - d) The ability to easily move to other months and years via selection (drop down list, etc.), rather than page through each month.
 - e) The ability to create recurring events as well as identify and list those in a recurrent series for editing purposes.

NEWS

1. **News Subscriptions (enotification)** – The ability for users to sign up to receive news categories (which should include event categories as well).
2. **News Publishing/Mailing** - The ability to keep news from publishing unless a specific option is selected. The ability to set up an item to be published at a specific date and time, as well as the ability to automatically trigger the sending of the news item to the subscribers at that time without additional intervention.
3. **News Archiving** – the ability to set specific archiving dates for individual news items to override default archiving dates.

DOCUMENTS

1. **Document Libraries** – Documents can be uploaded into a library which will be viewable and searchable by the public. Uploaded documents can be set to display to the public, or to not display. It is also desirable for this library to be exported to an Excel spreadsheet.
2. **Library Search (web editors)** – It would be desirable to be able to search for individual documents within the library and easily find where they are located.
3. **Icons** – it would be desirable for small icons indicating file type and size to appear when linking a document on a content item.

MEDIA

1. **Multimedia**–Easily incorporate streaming video, Flash or JavaScript animations, slideshows, webcams, or other types of multimedia content. This content may be delivered from third-party websites.
2. **Photos/Images** – Tool for resizing, optimizing picture quality, and improving upload speeds. Protection features for images to prevent copyright theft.
3. **Social Media/Web 2.0 features**–Single point access to push out content to various media sources (email news, Facebook, Twitter, etc.) with the ability to add new social media sites at will. We would like the ability to activate user-participation features on specific types of content, case-by-case. End users can like, follow, share, or recommend pages; rate articles; vote in simple polls or surveys; comment on articles (comments would be moderated before publication.); upload photos, videos, or other files in a secure way, requiring approval before publishing. We'd also like options to add blogs and discussion forums, and email subscriptions by topic.
4. **Libraries**–File links or photo displays could be published individually on pages, but with the option to create an automatic display of all the files in a library, or subsets based on metadata tags. Lists of links to documents could be managed to control the order of the list. Photos could be displayed in an album format, with captions and the option to have thumbnails linking to larger images. Libraries should be searchable in the CMS, at the very least by object id.

INTERACTIVE FEATURES

1. **Search**–The City currently uses a vendor provided Google search engine to provide site search. While we are happy with this solution, we are interested in learning about options integrated with the new CMS. In addition, we would like:
 - a) suggestions on naming conventions and metadata standards to improve search results
 - b) the search engine results integrated into the analytic tool
 - c) to provide the public the options of searching within pages, documents, calendar entries, and news
2. **Forms**–Simple and streamlined creation of forms, such as feedback or comment forms, applications for positions, registrations for events, and requests for information or services. Ideally the forms are based on a template that includes common fields such as first name, last name, address, etc. Multiple templates would be useful. Authors or Editors would have limited ability to deviate from the templates. Administrators could customize the forms or templates as needed.
 - a) Users could complete an optional registration and their contact information would be retained. When they return to the site those form fields would be pre-populated.
 - b) Select or checkbox fields could be linked to other content in the CMS. For example, if there's choice of city neighborhoods, the options could be automatically drawn from an existing list.
 - c) Dynamic features so some fields are displayed or required based on choices or values in other fields would be a plus.
 - d) Required fields or formats could be specified and optional client-side validation can be enabled for any field. Optional script-driven widgets would assist the selection of dates and times, or allow the calculations of fees or other values.

- e) Images or other files could be attached and uploaded. Only files of specific types would be permitted, and size limitations could be applied.
 - f) All forms must automatically validate input on the server to prevent malicious submissions or ~~form~~ from spam. Suspect submissions or uploaded files would be quarantined pending review.
 - g) The IP address of all computers submitting forms is automatically captured.
 - h) Submitted forms could be saved in a database, sent by email, or both. In the case of emailed results, the recipient of the email could be based on choices made in the form. The format of the email could be customized if desired. Information saved in a database could be exported and/or programmatically accessed by City systems. Successful submission of the form triggers a confirmation page, customized for each form.
3. **Interactive Service Requests** – a one-stop location on the City website where a member of the public can request a service, report a problem and upload a photo, or read a FAQ. The member of the public should be able to create a user account to keep track of the progress of their request. User requests should be able to be automatically forwarded to the responsible party within our departments. Internal service processors should be able to log in to the service request page (so they do not have to be part of the content editing team), see a list of service requests s/he has access to, submit a response to the member of the public and change the status of the service request.

USER BASED DESIGN

1. **User Research**–The new site should follow industry best practices for website usability, with design decisions based on testing. The City has already begun to collect information from internal stakeholders and the public regarding the features, organization, and design of the site. We will look to the vendor selected to provide guidance to help us create a successful site.
2. **Usability Testing**–At appropriate stages in the site design and development process, we want to test concepts and designs with user groups. Details of the testing will be determined as part of the project planning.
3. **Accessibility**–Both the public-facing site and any web-based internal management site must comply with current WCAG or Section 508 web accessibility guidelines. If the U.S. Government publishes revised ADA guidelines before this redesign project begins, the City reserves the right to use those instead. Menus should be navigable with a keyboard instead of a mouse and be friendly to screen readers, including features to skip over the menus. The public should be able to enlarge the font to meet their viewing needs.
4. **Translations**–The ability to automatically translate content to the End user’s preferred language would be desirable.
5. **Responsive Design** – at a minimum, the site should adjust to the width of the user’s browser – no side-to-side scrolling. Additional responsive features for phones, tablets are desirable.
6. **Browser, Device, Operating System, and Screen-size Compatibility**–The design must be tested with a variety of client systems to ensure that it displays correctly in each. We’re interested in suggestions from vendors about the best way to provide access for mobile devices and to ensure the site remains available as new devices and technologies emerge. A printer-friendly view of every page should be available.
7. **Mobile Design** – Integrate a mobile version of the websites which can detect the mobile browser of the site visitor.
8. **Splash Pages and Media Links** – PDFs, MS Office files, or other files should be indicated by an icon. It should be easy to add links to other websites and have them appear in the menu structure. “Offsite” links should be signified by an icon. Users should receive a “leaving this site” message with an option to return to the City site. These features also apply to offsite links in the body text of an article.

VISUAL DESIGN

1. **Branding**—The websites are an essential part of the City’s branding effort and common design elements between the websites, printed materials, and other communications products are desired. We are looking for a strong, clear visual identity that conveys what our community is all about and helps distinguish the City as a unique entity—and our region as a remarkable place.
2. **Design Themes** – The two websites will be designed with different themes, but each site will need the ability to adjust themes to provide continuity for various add-on sites, and templates for standard page types to improve consistency of design throughout the sites. For example:
 - a) Subtle differences in color, imagery, or other elements may help distinguish areas of the site from each other and aid in navigation.
 - b) Some programs are offered jointly with other agencies and may need a more “neutral” visual identity.
 - c) Parts of the site targeted at specific audiences may need to be slightly different, such as a larger default font on pages for older users, or “playful” elements on a page for children.
3. **Style Guide** – develop a style guide based on CSS design. This style guide can be a joint effort between the provider and the City.
4. **Text** – Headings, links and text need to be visually distinct and comply with the WCAG 3.0 recommended contrast ratio of 7:1. At least 5 levels of headers are desirable.

INFORMATION STRUCTURE

1. **Site Architecture and Navigation**—The City is gathering inventory and traffic data about the site and how it’s used. We are developing ideas about reorganizing the site. User research and vendor experience will continue to inform that process. The variety of programs and services we offer and the size and scope of our audience make information architecture and navigation a challenge.
2. **Alphabetical and Navigational site directories** –Auto-generated page with all menu items in a single alphabetized list, as well as in a list reflecting the site navigational structure. The ability to add aliases to menu items that would provide several different terms in the alpha list would be a plus.
3. **Metadata and Tagging**—Unique HTML titles and metadata for each page. The ability to add tags to articles would be a plus. It would be best if the available tags could be managed to prevent having too many similar but not identical tags.
4. **Maps Integration** – An ArcGIS public portal project is in progress. The websites must be able to integrate with ArcGIS. In addition, it would be desirable to incorporate small maps within content items such as pages, if possible.
5. **Facilities directory** – A directory to which facilities can be added. This directory should be sortable and filterable. For example, on the City website, we might want directories for the Public Safety Stations and Parks. On the Tourism website, we might want specialized facilities such as museums and galleries, theaters, etc.
6. **Employee directory**—An employee directory for the public that can include photos, text, links, and be filtered by department, as well as searched by the public.

CMS AND WEBSITE MANAGEMENT AND MAINTENANCE

1. **Backend Dashboard** – the ability to oversee site activity and tailor the workspace to an individual editor’s needs.
2. **Browser-based**–All management functions will be available through any modern web browser without the need for additional software or plug-ins. Personalized content, such as a list of articles an Editor or Author recently edited, or items pending approval would be useful.
3. **Content Review** – scheduled content review reminders to assigned editors/content owners.
4. **Drag and Drop Content Management** – the ability to move items in libraries using drag and drop.
5. **User Roles**–Multiple user roles with appropriate access and permissions, such as Administrators, Contractors, Editor/managers, Authors, and Moderators. Users can be assigned to groups and managed that way. Administrators can view records of user access, reset passwords, and change account details as needed, or suspend users or groups without removing them. Role to control access to html editing desirable.
6. **Menu Management**–Links to new content are automatically added to the correct place in the menu structure. Administrators can modify the structure to move items between categories or sub-categories, change the order of the items, or add links to external sites. Links to an article or section of the site could be added to multiple places in the menu structure.
7. **Rich Text Fields**–WYSIWYG field to allow editing text, tables, images, links, and other types of content with appropriate formatting.
 - a) Specific formatting options can be disabled according to roles. As much as possible, Authors could not deviate from the site graphic and accessibility standards. Only standard HTML markup and CSS classes would be allowed. Text originating from another source (such as Microsoft Word) could be filtered to remove non-standard HTML and CSS. Permissions for HTML coding is desirable.
 - b) Search/replace, un-do/re-do changes, and spell-checking. If Editors or Administrators could customize the dictionary used, that would be a plus.
 - c) The ability to add new images or use images already in a library. Tools to allow images to be cropped, resized, and optimized would be a plus. The ability to overwrite an existing image in a library would be restricted based on roles.
 - d) WYSIWYG features could be turned off to view and edit the code directly.
8. **Other Data Fields**–Article fields can be required if needed and validated if the data needs to be in a particular format. Relation fields could tie different types of content articles together. For example, in an article about an event the location would be selected from a pre-defined location table. Dedicated image or files fields would allow files to be published without the rich text field. This would apply when the image or file is the primary content, not the text. Appropriate metadata fields will be included. Specific fields can be read-only to prevent changing their value by anyone other than Administrators.
9. **Document and Image Libraries**–Images, PDF documents, and other files could be uploaded and managed. Files would be available to insert into the rich text field or published separately.
 - a) Files can be organized into libraries, with access controlled by user/group. These libraries must be searchable, as well as exportable into Excel spreadsheets
 - b) Multiple files can be uploaded at once.
 - c) Constraints on individual file sizes are automatically enforced, even with multiple file upload.
 - d) Library items and their metadata could be previewed within the CMS. Custom metadata such as document title, captions for photos, etc. would be a plus.
 - e) Limitations on the sizes and types of files could be set. Enforcement of file naming conventions (such as not allowing spaces or certain punctuation in file names) would be a plus.
 - f) Older files could be moved to an archive. They would no longer appear in the original location but could still be publicly available in an archive area.
 - g) Deleted library files are moved to an archive/trash area.

10. **Content Item Management**—Content items can be locked to temporarily override access settings. An audit trail of access and changes to content is maintained. Content items could be published or removed, or a published article replaced with an updated version, on a schedule. Content items, images, advertisements, etc. could be randomly rotated. Content items could be removed from the site without actually deleting them from the CMS. Deleted content items go to an archive/trash area where they could still be restored. The ability to download the audit trails to a spreadsheet is desirable.
11. **Links Management** – the ability to identify the locations of external and internal links on the site.
12. **Versioning/Rollback**—Previous versions of articles are retained, with the ability to rollback to an earlier version. Stored versions include date, name of the last Author or Editor, etc. The ability to preview the version before rolling back would be a plus.
13. **Workflow**—Publishing workflows that can be activated for different content items case-by-case. Workflows need to be customized by group and user. Automated emails should notify approvers and authors when items need their attention.
14. **Page Preview**—Preview the page with the content and all the global navigation before the article is published.
15. **Internal Search**—Backend search capability would be a desirable feature.
16. **Off-Site Access**—Secure, offsite access for authorized users without using VPN.