

1. Website Project Summary

I follow the approach documented in Pacesetter Media's "Principles of Implementing WordPress". This provides a general sense of my approach and many specific principles I use.

Read about the principles here: <https://pacesettermedia.com/blog/2022/principles-of-implementing-wordpress-notes-and-explanations-1/>

Enterprise Implementation

This proposal is for an enterprise implementation of WordPress. More than a small-business brochure site, this might include:

- multiple editors and users and maybe lots of users with various permissions and restrictions
- staff and user training
- regularly updated news sections serving different groups or audiences
- multiple sites for churches using the native WordPress Multisite feature
- concerns about accessibility and multiple languages
- lots of pages (more than 60) and probably growing
- requirements, wants, and needs that haven't been uncovered yet

Other Summary Details

- **Domain:** cayugasyracuse.org
- **Design** based on client guidelines and priorities
- **Writing:** None **Text Editing:** Use text from current cayugasyracuse.org
- **Expected Pages/Sections:** Similar to current cayugasyracuse.org
- Approximately 60 pages with more added regularly
- **Search Engine Optimization:** Yoast SEO plugin
- **Hosting:** TBD
- Integrate Google Analytics (for visitor stats)
- **Social Media Links:** Display social media logos with links to social media pages.
- **WordPress CMS** with **Twenty Twenty-Three Theme** customized with a child theme for design. We can mimic virtually any design you can find.
- Contact Form
- Photography - None - In-house or stock photos provided by client

Schedule

A good planning time is 4 months.

- Initial Design (30-45 days)
- Final Design and Launch (15-30 days)
- Initial Follow Up (30 days)
- Extended Follow Up (TBD)

Terms and Schedule

A good planning time is 4 months.

Often a lot of extra time is taken with decisions and revisions of design and the text, pictures, and video. Compound that with busy people reviewing, revising, commenting, and approving updates. It might seem simple, but writing, rewriting, editing and revising takes more time than many people think.

Amount Due

Estimate: \$6720

\$2240 at project start
\$2240 during final design phase
\$2240 when site is published

Site Back Up

At the end of the term, we send you a back up of your website including WordPress files, website images and video, and the website database(s).

2. Development Process & Specifications

Principles of Implementing WordPress

As much as possible, I follow the approach documented in Pacesetter Media's "Principles of Implementing WordPress". This provides a general sense of my approach and many specific principles I use.

Read about the principles here: <https://pacesettermedia.com/blog/2022/principles-of-implementing-wordpress-notes-and-explanations-1/>

Notable priorities include:

- Use the WordPress way for editing and styling.
- Avoid page-builder themes and plugins.
- Future proof content/data by using WordPress methods of saving the data and metadata
- Limit plugins to those that
 - meet the need and purpose of the plugin
 - are simple as possible while meeting the need
 - don't excessively slow the site or break priorities like accessibility

This approach includes creating a site that passes HTML and CSS validation as much as possible. (See the Aside "HTML and CSS".)

ASIDE: HTML AND CSS

All websites are made with HyperText Markup Language (HTML) and Cascading Style Sheets (CSS). It's been this way since the birth of the internet, CSS growing after 2000. The World Wide Web Consortium (W3C) has been and still is the organization that publishes the standards for how HTML and related web tech are supposed to work. The standards are always in development, but they are very stable overall.

HTML standards have always included provisions for accessibility.

A Good Guideline: Develop sites to meet the HTML standards and you get most or all of what's needed in accessibility, search optimization, responsiveness, and mobile usability.

My evaluation of any part of web development includes HTML validation.

ASIDE: HISTORY OF THE WORDPRESS EDITOR

A Quick Word On Terminology: "template" in WordPress means a single design for a single kind of page. In WordPress, "theme" refers to the files that manage the overall site design as well as some functions and features. Page "templates" are part of a site "theme".

From 2003 to 2018, WordPress used a content editor called "TinyMCE" or "classic editor" that behaves a bit like MS Word. Third parties created "page builder" plugins and themes that take over and replace the WordPress editor. Page builders make it easy for non-experts to move things around a page, but they make content difficult to use without that particular page builder; it's hard to go back to the WordPress-native editor or any other page builder or theme. They have other disadvantages like speed and complexity of the HTML code.

In 2018, WordPress began a transition to a new content editor called Gutenberg. It's very different from the previous built-in editor. It's also more like a page builder; not exactly, but it allows page layout more than the previous editor. AND it's native to WordPress. Using Gutenberg makes it much easier to switch to other Gutenberg themes, called "block themes". Many developers are creating block themes. It's the future "WordPress way".

This site design is an opportunity to switch to the new editor. This sets you up for the future of WordPress. This might require some training for staff writers and editors. (The Classic Editor can be installed and used in limited ways or for the entire site. That decision is part of the development process.)

ACCESSIBILITY

Accessibility can be complicated. The standards are detailed in the Web Content Accessibility Guidelines (WCAG). The documentation is extensive, dry and technical.

One of the first questions to consider is what level of WCAG conformance to use. Conformance levels are A, AA, or AAA. Making that decision could require detailed knowledge of these levels.

Automated audits make some assessment "simple". By starting with a simple theme and developing to meet HTML standards, we can create a site that gets high marks in automated accessibility testing. In a certain sense, it's this simple. This is the approach I start with. My designs get very good marks on automated audits.

As a general rule, good accessibility means some limitation on visual design and whiz-bang features. Moving images, subtle colors and text that appears/disappears could break an accessibility rule. Complicated menus make navigation difficult for those with limited physical movement. Expect some restrictions on design to if some measures of accessibility are required.

Writer/Editor Impact on Accessibility

Content created by users can break accessibility rules. If conformance is a priority, the writers and editors of your site should be trained on how to create content that conforms to standards.

USER MANAGEMENT

We can manage users with WordPress native functions plus several plugins: User Role Editor, Ultimate Member, Profile Manager

To restrict access to certain areas or types of pages, I suggest we add a Custom Post Type (an option built into WordPress). This custom post type can have its own section that's accessible to select users.

If your file sharing is mostly one-way, from the presbytery to churches or other groups, this could be a workable solution.

THEME SELECTION

I suggest we use the default WordPress Twenty Twenty-Three theme. With it, we can create a child theme and virtually any design you want.

- It's the first default theme that's fully and exclusively a block theme. It carries no legacy code or limitations, though we can choose to add the classic editor.
- It's very light and minimal, so we start with simple code and add only what we need for design and functions (plugins).
- With a block theme, we can switch to any block theme that's available virtually anytime. Provided a new theme does things the "WordPress way", such changes are easier when content has been edited with Gutenberg and not a page builder.

BACKUPS

Your site has new content about once a month in the "News" section. I don't have the update history of other pages. I suggest you back up your site at least monthly. Pacesetter Media can do this service, but it's generally simple enough with CPANEL that a non-expert can follow the steps. Plugins can automate backups.

At the end of the term, we send you a back up of your website including WordPress files, website images and video, and the website database(s). Subsequent backups can be regularly provided by Pacesetter Media, or it's generally simple enough with CPANEL that a non-expert can follow the steps. Plugins can automate backups.

DEVELOPMENT SCHEDULE

I suggest these phases and schedule for the project. The exact schedule depends on design services as well as review and decision making by your organization. This schedule assumes timely, ongoing reviews and decisions by decision makers OR extensive delegation to me to make decisions. Add time if your organization typically takes extra time to make decisions.

- Initial Design (30-45 days)
- Final Design and Launch (15-30 days)
- Initial Follow Up (30 days)
- Extended Follow Up (TBD)

INITIAL DESIGN

Copy Current Site to Hidden Development Server

- Assess and test converting current content to work in a block theme.

Initial Theme Development (Design) – Create a Child of WordPress Twenty Twenty-Three

- IMPORTANT: Early in this phase is the best time to uncover new or updated specifications, "needs & wants".
- Use dummy content or a sample of content from the current site.
- I expect the need to recreate pages in the new Gutenberg block editor because on the current site, pages are built with Square. Some online documentation says there's a way to export from Square to WordPress; from experience, I know conversions never "just work". There is always tweaking or fixing.
- Create only the design.
 - Based on guidance from client.
 - We can mimic virtually any design you find online.
 - We can adapt virtually any piece of any design or site.
- This is an iterative process of design, develop, review, redesign, review, tweak design, approve.

Initial Training

- Provide initial training for staff.
 - This is a good time to try the new Gutenberg editor.
 - This is NOT the final training. Good training includes repetition and hands-on experience. This is the first repetition.
 - We can use generic online training for orientation and self-guided training on WordPress and the new Gutenberg editor.

FINAL DESIGN AND LAUNCH

Final Theme Development (Design and Plugin Integrations)

- Import current content from the current site.
 - This probably involves recreating pages manually.
 - News posts might convert more easily.
- **From this time forward, we should track content updates on the live site** because we might have to recreate them on the development site. This depends on how easily current content converts to a WordPress-native block theme.
- This involves another iterative process of design, review, and tweak.

Second Training and Documentation

- Create documentation for users and developer notes for developers.
 - In this phase of development, we'll know most of the styles, features, and guidelines we need for your site. We'll document those customizations and any step-by-step how-to users need. (This is not comprehensive WordPress documentaion. Only customizations and possibly repeated tasks are to be included.)
 - Developer notes are for me and any future developers to more quickly understand technical decisions and implementations.
- Provide more training for staff.
 - This is another repetition of training on Gutenberg.

Go-Live Date

Once we're satisfied with the result, we publish the site.

FOLLOW UP

Initial Follow Up

Only NASA has the budget for anticipating and testing every contingency. Otherwise, all software projects should include time for alpha and beta testing. For this project, that's mostly done during development. And we should expect tweaks and relatively minor updates once it's released to the public.

We should expect a flurry of tweaks and updates in the first 30 days and perhaps some others for up to 90 days.

Extended Follow Up

Ongoing services depend on your preferences. Once the site is working, it could work like your current site.

- Staff does day-to-day editing.
- Every now-and-then you call me for specific tweaks or updates.
 - I also offer discounts for ongoing services with a minimum of 5 hours per month.

3. Budget

Estimate: \$6720

\$2240 at project start

\$2240 during final design phase

\$2240 when site is published

This is based on estimated time based on my experience. For instance, a recent project of 60 pages took over 32 hours just for the technical change from a page-builder theme to the new WordPress editor. It did not include a design process because we recreated the same visual design, and the company has a single decision maker. (abcnetfl.com)

This project has additional items like design, training, documentation, multiple decision makers or influencers, and support. And I've included some time for unanticipated requirements.

I have rarely if ever gone over budget, and then only when the client adds requirements. In the end, I charge the lower amount when the project is under budget and limit the price to the estimate unless there's a significant change in requirements. See references for a recent comprehensive website project that finished under budget.

Website Hosting

Standard Hosting is \$275/year and is included for the first year.

Advanced hosting might be needed for the multisite function or high traffic.

4. Client References

Dr. Olatunde Fatinikun, owner

Whitechapel Behavioral Services, LLC
ofatinikun@whitechapelbehavioralservices.com
(813) 445-5538

<https://whitechapelbehavioralservices.com>

This was a recent comprehensive design and development project including logo design, web design, content writing and editing, SEO and social media set up. During the project I also designed fliers and business cards and did on-site photography for use on the site and elsewhere online.

This project finished under budget.

David Thornton, owner

A Better Choice Network Solutions
Dthornton@abcnetfl.com
(813) 605-7251 ext 1

I work with A Better Choice Network Solutions on their website, social media, print material, promotional items, advertising, and graphic design.

Larry Becker, Author, Speaker, Video Entrepreneur

GreatOnCamera.com
lklbkr@gmail.com
813-478-4683

I've known and worked with Larry since the mid-1990s. We worked at the same company and built their first website together. We also worked on training videos and tech manuals. Since then we've continued to work together on a variety of media projects: video, photography, training, PhotoShop World, websites.

He can speak of my years of experience in media production including websites.

Skills and Experience

Business Communications

Websites, Promotion, Print Layout, Graphic Design, Video, Writing, Trade Shows

Web and Media Production

Website Development, WordPress, Photography, Audio and Video Production

Promotion

Print Material, Graphic Design, Social Media, Promotional Items, Events, Trade Shows

Work Experience

Promotions and Marketing

President/Owner of Pacesetter Media

May 1999 to Present

- All aspects of running a small business: sales, promotion, billing, operations
- Delivering full range of products and services offered by Pacesetter Media
- Budgeting and estimating client projects

Web and Media Production

Developed a CMS in PHP, SQL and CSS. Currently create WordPress themes, plug-ins and designs. Photography, video and audio production.

Print Material and Promotional Items

Design print and promotional material for clients, advise clients on options, adapt client material for use in printing, order and schedule production and delivery.

Promotions and Events

Consult with clients, help run events and trade shows, moderating sessions at Photoshop World (2001 - 2020, running Momentum Festival (2001 - 2012)

Instructor: Graphic Design, Web Development, Advertising, Writing (Part-Time)

- Southwest Florida College, 2004 - 2005
- Florida Metropolitan University, 2003 - 2005
- International Academy of Design and Technology, 2002
- University of South Florida, 2000 - 2001
- Hillsborough Community College, 1990 - 1991

Marketing/Training/Customer Support

Protel, Inc., 1991 - 1999

Fulfilled several roles getting valuable experience in:

- marketing
- training & event planning
- electronics
- web design
- PR
- technical sales
- graphic design
- multimedia & video
- business management

Website Coordinator

- Managing the goals, content and resources of the corporate web site.
- Designing web pages.
- Writing and reviewing advertising copy & technical bulletins.
- Writing and directing promotional multimedia projects.

Marketing/Training/Customer Support

- Writing and directing promotional multimedia projects.
- Writing product documentation, layout and design.
- Creating training programs and conducting training on software and hardware including classes, videos, and documentation.

Military, Community Involvement, Early Career

- Communications Officer (Captain), Army Reserve and National Guard, 1984 - 1994
- Board of Trustees, Brandon Groves North Special Tax District , October 1996 - Present
- Publication Manager for a small Tampa publisher, 1989 - 1990
- Freelance Writer, 1988 - 1990

Education

Bachelor's of Art in Journalism, Indiana University of Pennsylvania

Professional Courses

- Photoshop World Conference, 2001 to 2020 (over 25 conferences)
- COMDEX Enterprise E-Commerce Sessions
- Lakewood Publications Total Trainer Conference
- Signal Officer's Course (Electronics & Communications)
- Additional college course work in marketing, sales, organizational development and related subjects