

THE NONPROFIT WEBSITE PROJECT HANDBOOK

by

Yesenia Sotelo
Founder
SmartCause Digital

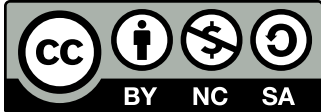


This handbook offers an overview of the website design and development process and information helpful to nonprofit staff during a website project. We hope this handbook helps nonprofit staff build websites that inspire supporters to take action.

The Nonprofit Website Project Handbook was written and designed by Yesenia Sotelo, Founder at SmartCause Digital. SmartCause Digital is a web development and digital strategy firm that works with nonprofits to build websites and run online campaigns.

www.smartcausedigital.com/website-handbook

August 2012



This work is licensed under a Creative Commons Attribution-NonCommercial-ShareAlike 3.0 Unported License. You are free to distribute, transmit and remix the Handbook. You must attribute the work to SmartCause Digital. You may not use this work for commercial purposes. If you alter, transform or build upon this work, you may distribute the resulting work only under the same terms or similar license to this one.

TABLE OF CONTENTS

Knowing What You Have & What You Want to Have

p 5

Choosing a Vendor

p 9

All the Details

p 13

Discovery

p 16

Site Map

p 20

Wireframe

p 22

Design

p 24

Development

p 27

Content

p 29

Testing

p 31

Launch

p 33

Training

p 35

Wrap Up & Documentation

p 37

APPENDICES

Glossary of Terms

p 39

Sample Website Project Timeline

p 42

Sample Website Site Map

p43

Sample Website Wireframe

p 44

Sample Website Launch Checklist

p 45

KNOWING WHAT YOU HAVE

& WHAT YOU WANT TO HAVE

Even before we consider technology, the most important step in preparing for a website project is to reflect on your organization's goals, capacity and culture.

WHAT IT IS

This step is an assessment and tweaking of your organization's capacity to successfully manage a website project. You will invest time into drafting goals for the website, identifying target audiences and documenting timeline and budget. Armed with this information, you will also assemble a decision-making team, identify a decision-making process and appoint a project leader.

WHY IT MATTERS

Preparing in advance will help your nonprofit organization make the best use of limited resources such as budget, staff time and social capital. For example, appointing a project leader and documenting a decision-making process will help the team complete the project as planned, and spare the organization from the expense of a derailed project.



GOALS

What does your organization hope to accomplish with this website project?

Limit the number of overall site goals. Accept that this website cannot be everything to everyone.

Choose and document goals that are streamlined, measurable and relevant. An example of a great website goal: "Generate 500 state-level advocacy actions within the next six months." Learn more about SMART goals at http://en.wikipedia.org/wiki/SMART_criteria.

Encourage staff to consider some of the website's goals as seasonal. For example, a site may be dedicated to advocacy, but the exact approach to advocacy may change throughout the year. During the legislative season, the site may focus on generating email messages to state legislators. During the summer, the site may focus on generating downloads of academic research supporting the site's issues.

AUDIENCES



Who does your organization hope to reach and inspire with this website project?

Accept that "everyone" won't be compelled to visit this website.

Choose and document audiences that are focused, active online and who can be inspired to act via a website. An example of a great audience to reach: "Illinois women between the ages of 35 and 55 who have children living at home and attending school."

Think of audiences as primary and secondary. For example, Illinois women may be the primary audience for whom your organization created the website, and Illinois legislative staff may be a secondary audience that will also use and benefit from the website's content or tools.



TIMELINE

When will this project be completed?

Aim for a project timeline that is not too brief and not too long. A timeline that is too brief, say a month, will sacrifice valuable steps such as #4 Discovery and #10 Testing. A timeline that's too long, say six months, will lose focus and momentum. Consider a timeline around three months. (See page 43 for a sample timeline.)

Sometimes a project team feels more accountable if the launch date is pinned to an important, recurring event such as mailing invitations for the annual benefit.

When drafting the website project timeline remember to work around vacations and other significant annual organization events.

Add some padding to the timeline... and keep it in reserve. The project leader can modify the timeline when and if s/he determines that an adjustment is necessary.



BUDGET

How much of your organization's resources will be invested into this website project?

There are quality web professionals who can work with your organization at any budget, from \$500 to \$100,000 and more. Many nonprofit website projects fall into the \$5,000 to \$20,000 range.

Plan for a 10% slush fund in the budget. This fund may be used if your organization wishes to add a feature after the contract is signed or provide additional training for staff after launch.

Budget for staff time as well. Your project leader and decision-making team will dedicate a significant number of hours to this project. For example, a website project leader can expect to contribute 20 to 40 hours of her or his time.

Ongoing website maintenance and website hosting should be included in your organization's overall budget for the remainder of this and future fiscal years. Web developers may charge anywhere between \$50 and \$200 per hour.

TEAM



Who will provide ideas and feedback to the website project?

Accept that "everyone" won't be compelled to visit this website.

Choose and document audiences that are focused, active online and who can be inspired to act via a website. An example of a great audience to reach: "Illinois women between the ages of 35 and 55 who have children living at home and attending school."

Think of audiences as primary and secondary. For example, Illinois women may be the primary audience for whom your organization created the website, and Illinois legislative staff may be a secondary audience that will also use and benefit from the website's content or tools.



PROJECT LEADER

Who is the captain of this website project ship?

Choose someone whose job description matches the goals of the site. For example, if the site is linked to an advocacy campaign, choose a project leader who also works in advocacy.

Choose someone with a good amount of social capital within your organization. The project leader will lead important discussions, build consensus among many interested parties and aim to complete a project on-time and on-budget. So choose someone that has a good reputation among the staff and project team.

Ensure that the project leader is able to commit a significant amount of time to this project. S/he can expect to commit 20 to 40 hours.

Empower the project leader to make and enforce important decisions.



TECHNOLOGY CONSIDERATIONS

What technology is your organization currently using?

The most successful websites work in harmony with other software tools.

Take an inventory of what tools your organization is using for: fundraising, accounting, advocacy, inventory, email marketing, event registration, credit card processing, volunteer tracking, program evaluation, logging staff time and handling client support.

Identify a few existing software tools that are critical to the success of the new website. For example, an advocacy website should work well with a campaign's advocacy software tool.

INSPIRATION



What are some sites that you find compelling or that inspire you to take action?

Compile a list of a few websites that you think are effective at accomplishing their goal.

Think of this list as the equivalent of bringing a picture to your hair stylist. Your web designer and/or web developer will use the list of sites to engage you in conversation about what features you like and want to include in your own website.

CHOOSING A VENDOR

There is a great vendor that can work with your organization's goals, budget and project team. Here's how to identify her or him.

WHAT IT IS

A web developer or web designer understands the strategy and technology to build an effective website, host a website and maintain and grow a website.

WHY IT MATTERS

Website technology options are too vast and ever-changing for a small organization to completely handle a website project in-house. Whether you choose to consult with a web professional for a few key decisions or choose a consultant who can build the entire website, your organization must choose a vendor that is a good match with your budget, work style and communication needs.



BUDGET

Should you work with a freelance web professional or a firm?

Web professionals can work with a project of any budget size. Most nonprofit website projects fall between \$5,000 and \$20,000.

A freelance web professional will often be a more affordable option. S/he will also probably specialize in a particular tool (Drupal or WordPress, for example) or a particular aspect of a website project (design or development, for example). Freelance web professionals are a good option for website projects that have defined goals and strategic requirements. In other words, completing #1 Knowing What You Have & What You Want to Have can save your organization money!

A web firm can sometimes be a more expensive option. A web firm is also more likely to offer a wider range of technology options, such as expertise in Drupal AND WordPress or having a designer AND a developer on staff. Web firms may be a good option for website projects that have undefined goals, changing strategic requirements or an urgent completion deadline.

“Fast, cheap or good. Pick two.” Consider this statement when deciding between a freelance web professional or a firm.

TO RFP OR NOT TO RFP

Should you distribute a Request for Proposals (RFP) or contact a few potential vendors?



RFPs can help nonprofit organizations communicate their goals, desired outcomes and expectations. RFPs can also help organizations compare vendors against each other.

If your organization decides to create an RFP for the website project, keep the document concise and include a desired budget range. You can find a website RFP template at www.techsoup.org/binaries/files/RFP_web_sample.pdf.

Whether or not your organization creates an RFP, use your network of nonprofit organizations and trusted colleagues to identify vendors that have nonprofit experience and who have a strong reputation.

Web and design professionals hate RFPs. This is a fact. Following these steps will help vendors embrace your organization's RFP.



WORK STYLE

How does your organization collaborate and communicate?

Consider whether your organization prefers to make decisions and offer feedback in person at meetings or via phone or email message. Ask potential vendors how they prefer to collaborate with their clients.

Consider whether your organization will feel more comfortable working with a local, national or international vendor - or if you have no preference at all. Some organizations prefer a local vendor simply to have the option of in-person meetings, if needed.

Consider whether your organization works mostly during the business day or whether you collaborate around the clock via online tools. Both freelance web professionals and web firms may keep non-traditional hours. Ask potential vendors what their typical response time is to a client's question.

Ask potential vendors to identify the person who will serve as your main point of contact. Is that person truly knowledgeable about web technology? Is s/he empowered to offer clients solutions and services? If your internal project leader isn't a technical staff person, be careful with vendors who assign a point of contact who has no technical or design background. At least one project leader should be well-versed in the technical aspects of a website!

NON-TECHNICAL SKILLS

What communications and management skills does your organization need from a web professional?

Choose a vendor who can describe web technology options in a way that is easy for you and your project team to understand. For example, ask potential vendors to explain what a CMS is and why you should consider using one for your website project.

Choose a vendor with a strong project management system. Ask potential vendors how they handled a project that was running behind schedule.

TECHNICAL SKILLS

What programming and design skills does your organization need from a web professional?

"Front-end" web development includes aspects of a website such as font, colors, images and layout. "Back-end" web development includes aspects of a website such as features, forms, tools and databases. Both sets of skills are required for a successful website project.

Many software companies provide special discounts or special packages for nonprofit organizations. Ask potential vendor what discounts or deals they've secured for other nonprofit clients.

Most nonprofit organizations have a few tools that are integral to their success, such as their fundraising database. Ask potential vendor how they've incorporated other software tools into a nonprofit organization's website.



REFERENCES

What questions should you ask when checking a vendor's references?

Who was your primary point-of-contact? Were they able to answer all of your questions to your satisfaction?

Did the project finish on-time and on-budget?

Does your website accomplish the goals as identified and, if so, by what percentage?

How easy is it for you to make routine site updates?

What was the reason for the last time you called the potential vendor and what was their response time?

Do you ever receive compliments about the website?

Do you ever receive complaints about the website?

RED FLAGS



What are some warning signs that a web professional might not be the right fit for your organization?

The designated vendor project leader has no technical or design background.

Your RFP or requirements indicate that your organization wants to use an open source solution such as Drupal or WordPress and a vendor's proposal advocates for a fee-based or custom-built option.

A vendor pushes a template approach such as including a whole suite of features that your organization doesn't need. These are vendors that use one website "recipe" for all of their clients, regardless of goals or requirements.

A vendor's contract requires that a link to the vendor's website be placed on your finished website project.

ALL THE DETAILS

Contracts, timelines and project management software are the little things that will make your website project a huge success.

WHAT IT IS

A contract is a written, binding agreement between your organization and your vendor. A timeline is a document listing important deadlines by when specific project tasks must be accomplished. Milestones are major tasks that indicate progress on a project.

WHY IT MATTERS

When combined, these three documents protect you and your vendor against disagreements, missed deadlines and failed objectives. In other words, these three documents help ensure that your hard work will produce a successful website!



CONTRACT

What information should you include in the website project contract?

Ensure that the vendor will store logins, passwords and other confidential data in a secure manner.

Ensure that the contract lists the project's budget and describes the services included in the budget.

Ensure that the contract lists an agreed upon payment schedule. Many web professionals require a deposit at the beginning of a project, and then progressive payments at specific milestones.

Ensure that the contract identifies how many proposed designs your vendor will produce, and how many rounds of edits you can request during the design and development phases.

Ensure that your organization retains ownership of branded images and graphics produced by a designer for your website project. Be aware, your vendor may work with you to secure licensing to include third-party photos or images on your website and your organization may not have exclusive ownership of those components.

Decide whether your organization wishes to own the code produced by the vendor. If so, include that stipulation in the contract. Be aware, if your vendor is using open source software, a great portion of your website's technology will be licensed to you under open source agreements and your organization will not have exclusive ownership of those components.

TIMELINES AND MILESTONES



What should you consider when drafting or reviewing proposed timelines and milestones?

You should expect to provide feedback at the following stages: discovery, design, development, content, testing, launch, training and wrap-up.

Ensure that dates that require your or your project team's input are scheduled around important organization events or vacations.

Consider whether rewards or costs should be associated with early or late delivery of important milestones.



PROJECT MANAGEMENT SOFTWARE

What should you consider when choosing a project management tool for your website project?

Ensure that the tool has options to add milestones to an easy-to-view calendar. This will help you see the big picture of your project's overall timeline.

Ensure that the tool has options to upload documents and/or track notes. This will help you compile notes from project meetings, especially those that pertain to important decisions.

Ensure that the tool has the option to assign a task to another user and notify them that the task has been assigned.

Paid software options include Basecamp and Pivotal Tracker. Free software options include Rule.fm and Trello.



COMMUNICATIONS CHANNELS AND SCHEDULES

How will you and your vendor collaborate during this website project?

Consider setting up a weekly standing check-in time. The phone call can be as brief as 15 minutes and will serve as an opportunity to address any outstanding issues. This check-in meeting will augment and not replace longer meetings associated with project milestones.

Document all meeting notes, especially those related to decisions or changes. Track these notes in your project management software. As the project progresses, there will be so many changes and decisions that they will be impossible to track individually. Your notes will serve as your extra project brain!

Decide whether your check-in and milestone discussions will take place in-person, via conference call or Skype, via webinar or some combination of the four. In-person meetings work well for milestones such as discovery and training. Webinars or conference calls may suffice for check-in meetings.

DISCOVERY

The discovery and research phase of a website project is the most valuable investment of your organization's time and effort.

WHAT IT IS

Discovery refers to research and discussions about the website's goals and how to effectively accomplish them. The discovery process may include interviews with staff, board, volunteers, donors and/or clients. Your vendor may also research your organization's and your competitors' marketing and communications materials. At the conclusion of the discovery process, you and your vendor will make meaningful strategic, design and technical decisions about your website project.

WHY IT MATTERS

A well-executed discovery phase will produce a project brief, a list of site requirements and design guidelines that will form the foundation of your website project. These documents will determine all aspects of your website from the style of the font to the way the contact form works to where the list of board members is placed.



PEOPLE

Who should you involve? When should you involve them? How should you involve them?

Your web project team (from #1 Knowing What You Have & What You Want to Have) will often be the first group that your vendor will interview or survey. You may also reach out to staff, board members, program officers at foundations that have given your organization grants, elected officials that represent the areas where you execute your programs and the people that you serve.

When considering which groups to include, refer back to your goals and primary audiences (from #1 Knowing What You Have & What You Want to Have) and select groups that can provide direct feedback.

You may choose to work within a limited budget by gathering feedback from primary audience representatives via time-consuming mechanisms such as phone calls, and gathering input from other groups via streamlined mechanisms such as an online survey.

If there is no room in the project budget for your web vendor to interview stakeholders, consider sending an online survey to your staff, board and email subscriber list. This method is not targeted but it is more effective than not gathering any feedback at all! Remember, a successful website depends on feedback from the people who will be engaging via the website.

REVIEW



Whom will this site target and what will your organization ask them to do?

The effort you put into #1 Know What You Have & What You Want to Have will prove invaluable to you and your web vendor as you work together to define goals and audiences for the website. Be prepared for curveball questions from your vendor and be open to suggestions that slightly modify goals or audiences in the interest of improving the project.

Yet, remain true to the core values and intentions behind the goals you created in #1 Know What You Have & What You Want to Have. Sometimes web vendors want to build an interesting feature that may be out of scope for your specific website project. Don't be afraid to say "no", ask for a more detailed explanation or ask to see an example of an idea that you feel may not be the right fit for your website project.



ANALYZE

What are some other considerations when creating a website?

You and your web vendor will discuss some or all of the items below as you move towards deciding how the site will be built.

Branding: Discuss your site's current logo, colors, writing style, images and perspective. Your web designer may ask to review your written brand guidelines or ask you to complete a survey. S/he will also ask whether the new website project should adhere to your organization's brand or adopt an independent look and feel.

Image library: Discuss your organization's selection of high-quality images, and plans for acquiring more images. Your web designer will want to determine whether your organization's images will be used on the new website, whether s/he will search for images to use from stock photo collections and whether the site will be updated with new images on an ongoing basis.

Analytics: Review the website traffic analytics for your existing site to identify patterns and areas of opportunity. Pay attention to the most popular pages on your site and what routes visitors followed to arrive there.

Accessibility: Discuss how to make sure as many users as possible can view and interact with the site. Senior citizen, visually-impaired, deaf, color blind, low-literacy and multilingual users are routinely shut out of many websites. Learn more at <http://webaim.org/standards/508/checklist>.

Content: Discuss what content to include on the website and, if necessary, how to produce it. More information in #9 Content.

Maintenance: Discuss how much your organization will budget for ongoing site improvements. Your organization should require that routine edits be simple enough for a staff person to perform. For site-wide edits or feature upgrades, you can expect to work with a web developer or designer.

Staff capacity: Discuss how much time your staff has to devote to creating and posting new content. Be realistic. For example, don't ask your web vendor to build an events calendar if your staff doesn't have time to collect and post community events on your website.

Workflow: Discuss what process your staff will use to review, approve and post content. Your web vendor may be able to help streamline this task by building in a workflow into your new website.

DECIDE

How will this site be built?



Finally, you and your web vendor will make and document key decisions about this website project.

Project Brief: Document the site's overall goals, target audiences, timelines, milestones, budgets, decision-making structure, content, stakeholder feedback, analytics, etc. This document will serve as the foundation for your website.

Design Requirements: Document the brand, colors, fonts, style and images that will be used on the new site. The way your website "looks" and the way it "works" are actually very separate. It's important to start thinking of design and technology as related, yet independent.

Mobile: Document how your site should behave when a website visitor views it via a mobile device or tablet. See examples at <http://webdesignledger.com/inspiration/24-excellent-examples-of-responsive-web-design>.

Technical Requirements: Document the features for your new website in explicit detail. For example, "the contact form will require name and email address, provide a field for comments, email info@my nonprofit.org and save the form data for review." The technical requirements will also indicate what technology will be used to build the site, and how the site will handle data such as subscribers' email address or credit card information. Whenever possible, choose an open source website platform such as Drupal or WordPress. These options provide the most long-term value and flexibility for your organization. Whenever possible, choose to transmit important personal information via a secure socket layer (SSL) form.

Constituent Relationship Management (CRM): Document whether your website will also include tools to track constituent information such as name, email address, issue preference and donation history. CiviCRM is a popular, open-source CRM tool that works with both Drupal and WordPress.

Search engine optimization (SEO): Document what keywords are relevant to potential website visitors. This list of keywords will be useful to your vendor as they create the site and to your project team as they create and edit the website's content.

Domain: Document what domain(s) will be used (and purchased) for this website project. Ensure that your organization maintains control over the domain registration. Do not let your web vendor be the exclusive manager of this key asset.

Webhost: Document what webhost will be used for this website project. There are options at every price range from \$5 per month to \$500 per month. Your web vendor can assist you in identifying a reliable webhost. Your web vendor may manage this relationship, but your organization should retain ultimate ownership and login information.



SITE MAP

A site map organizes your website's content and is an important tool for members of the project team that will create or edit content.

WHAT IT IS

A site map organizes your site's content into logical main categories, sub-categories and pages. A site map does not indicate how your site's content and features will be organized on a page, or how the site will be designed. See page 44 for a sample site map.

WHY IT MATTERS

A site map determines your site's structure, and influences how website visitors will find information on your site. Site maps are also used by search engines like Google to organize your site's information in their database. The best site maps are logical, simple and easy-to-understand.



ORGANIZATION

Do the categories make sense to a new website visitor?

Review your website's analytics to help you to identify how website visitors are interacting with your site's content.

Choose categories for your site map that make sense to a brand new website visitor who knows nothing about the issue. It does not matter how your organization's staff is organized or how the coalition has divided the work.

Consider organizing your site map according to what a visitor can do on the site. For example, "Learn about Autism", "Volunteer", "Sign up for Updates".

You can also consider organizing your site map according to issue, and offer opportunities for engagement accordingly. For example, "Childhood Hunger" as a main category and "Donate", "About Childhood Hunger", "Contact Your Legislator" as pages within that section.

SEARCH ENGINE OPTIMIZATION

How can the site map be organized to improve your site's position in search engine results?



Choose people-friendly titles. An organization may like to talk about "strategic initiatives" but a website visitor might be looking for "programs helping hungry children".

Identify some popular keywords in your website's analytics. Create pages for each of those keyword phrases and add valuable content. For example, if many people arrived at your site by searching for "how can i help hungry children in Chicago", create a page called exactly "How to Help Hungry Children in Chicago", and pull in the resources that already exist elsewhere on your site into one easy-to-read page.

WIREFRAME

Wireframes help your organization and your web vendor discuss the layout of your site and how specific features will work.

WHAT IT IS

A wireframe represents the layout of a website without any design elements, such as colors, fonts or logos. See page 45 for a sample wireframe.

WHY IT MATTERS

A wireframe allows you and your vendor to discuss the placement of major elements of the site and explore how specific functions will work. You may also inquire how each element will be updated after site launch and specify which elements should be easy to update by staff.



CONVERSIONS

From this wireframe, can a new website visitor determine what they can do on this site?

Be certain that the wireframe is structured so that a new website visitor can easily identify and complete your site's goals such as "donate" or "join".

FEATURES

"What happens if I click here?"



Engage your web vendor in specific conversations about features and pages.

Don't assume anything. The way you've imagined a feature may not match the way your web vendor plans to create that same feature.



MOBILE

What happens when a visitor views the site using a mobile device?

Many younger users and communities of color use mobile devices as their main internet device, bypassing personal computers.

Your site can be built using a responsive or mobile-friendly design that will serve your organization for at least a few years. See examples of responsive design at <http://webdesignledger.com/inspiration/24-excellent-examples-of-responsive-web-design>.

BUT...

"I don't get it. It's just a bunch of boxes."



Yes, wireframes can be a bit confusing. Wireframes are similar to blueprints for a building or a sketch of a designer dress. They are a preliminary step on the way to creating the final product.

Do not walk away from the wireframe until you feel like you understand it. This is a key step. Ask all your questions. Print out the wireframe and sit with it. Have your web vendor talk you through the wireframe.

DESIGN

Design is more than colors and images. An effective design will compel and inspire your website visitors.

WHAT IT IS

The design of a website includes its colors, fonts, images, and styles. It may also include the way in which some features work. For example, an effective website design may provide a “loading” image to indicate progress while waiting for a download to complete.

WHY IT MATTERS

Though this is one of the final strategic decisions that you will make for this project, design is one of the first aspects of your website that visitors will notice, and one of the aspects that website visitors will remember.



OPTIONS

How many designs should your organization request?

Request two to three proposed designs.

You can compare and contrast the proposed designs and identify which aspects of each you find effective.

Understand that your project budget may not accommodate alternate designs or may limit the number of revisions that you can request.

CONSIDERATIONS

What should you consider while reviewing the design?



Branding: Ensure that the site adheres to the brand and style requirements from #4 Discovery.

Image library: If the proposed design requires many images, consider whether your organization's current and future image library will suffice. If your graphic designer has proposed using stock images, consider whether those stock images still convey authenticity.

Ease of reading: Imagine what the page will look like if it contains a very long article or a list of one hundred items. Ensure that web visitors can easily read and scan your site's pages, regardless of the content's length.

Ease of printing: Ask your graphic designer and web developer what the website's pages will look like when printed. Ensure that pages with articles and institutional information print well.



RELEVANCY

Does it look like a _____ site?

Do the fonts, colors, styles and overall graphic design indicate what your site is about? You are probably reviewing a design that contains placeholder text and some proposed images, not your site's final content.

Even at this stage, you should start to see your site's style and intent come through in the graphic design elements. For example, if you remove all the text and the logo from Nike's or Coca-Cola's websites, you would still know they are sites about athletic apparel and soft drinks, respectively.



EVERYONE HAS AN OPINION

How can your project team provide your graphic designer with constructive feedback?

For elements that you dislike, ask your graphic designer why s/he chose that approach. You can then engage in a discussion about why this element may or may not be right for your site.

If you don't believe an element is effectively accomplishing its goal, try to find an example of an effective approach. For example, if you don't think the "Donate" button is right for your site, show your graphic designer another "Donate" button that compelled you to support another organization or product.

Don't ask a stranger to review the design at this stage. Without your own content, this design isn't ready for a wide audience.

TECHNOLOGY

Will it fly?



Sometimes a graphic designer will include features in a design that are not technically possible within your website's content management system.

Ask whether your project's web developer has reviewed the design and verified that s/he can build it.



DEVELOPMENT

This is a “quiet phase” for your nonprofit organization, while your web developer is creating your custom website.

WHAT IT IS

Web development is the manipulation of HTML, CSS and programming languages to create the functions and features of a website.

WHY IT MATTERS

There are many ways to build a website. By providing your web developer with a well-researched list of technical requirements and a design that’s been vetted by your organization, you can ensure that the technology behind your website will be the right one for the job.



UPDATES

How will you and your web vendor communicate during this phase?

Schedule a couple of brief check-in calls with your web developer while s/he is building your site. These calls are an opportunity for her/him to ask you questions for clarification and for you to ask whether s/he has any questions. Significant project decisions have already been decided and documented.

DEVELOPMENT SITE

Will your project team be able to see the site as it is built?



Ask your web developer to build on a development or staging site.

If s/he agrees to use a development site, you will be able to visit the site at your own leisure to assess progress.

Understand that you may visit the development site while a feature is being built and appears broken.



WEBHOST

Where will the site's files be located for launch?

Ensure that your organization has chosen a webhost for the final site and that your web developer has affirmed that your chosen webhost can support your website's new technology requirements.

Provide your web developer with login information for the webhost, in preparation for launch.

ACCESSIBILITY

Is your web vendor building the site with accessibility features?



Ensure that your web developer is familiar with your project's accessibility requirements from #4 Discovery.

Ensure that your web developer will validate the site's HTML and CSS.

CONTENT

Fill your new website with fresh, targeted content.

WHAT IT IS

Your website's content includes everything that your graphic designer and web developer will not create. This includes the "about us" boilerplate, the privacy policy, the intro text to the contact form, the caption for the picture of the board. Everything else.

WHY IT MATTERS

Your site will be most successful if you create new content or heavily edit existing content to fit your goals and audiences. Some of your edits will modify tone and style, and some of your edits will modify size to fit into the dimensions of a new design.



CONTENT STRATEGY

What will your new website's pages and buttons say?

Use the information from #1 Know What You Have & What You Want to Have and #4 Discovery to craft relevant, compelling content for your new website.

Use everyday words. Pretend you're writing a letter to your grandmother. If you feel the urge to use niche terminology, save it for your next grant proposal.

Refer back to your list of keywords from #4 Discovery and include those words in the content for this website.

Make a plan for creating content for your site in the coming weeks and months. Invite staff, board, volunteers and donors to contribute their stories.

PROOFREAD

Is the content ready to be published?



Consider asking a few trusted colleagues or friends to proofread the site's content. You and your project team will probably be deep in the trenches at this point in the project and fresh eyes will be a welcome asset.



TRANSFER

Who will transfer the content to the new website?

Either your project team or your vendor can transfer the content to the new site.

If your vendor transfers the content, it will relieve your team of the added task. But s/he may miss some key errors or opportunities for improvement.

If your project team transfers the content, you will have to do some light website training before starting the task.

SCHEDULE

How much time will you need to transfer content?



Don't underestimate how much time it will take to create, edit and transfer the site's content.

If you can afford to, allocate at least a week in the project schedule for content transfer.

TESTING

Testing a website before launch allows your organization to identify and fix bugs before launch.

WHAT IT IS

Test your website with representatives from target audiences by having them interact with the website and provide feedback for areas of improvement.

WHY IT MATTERS

Studies show that testing a site on as few as five to ten users can help your organization identify eighty percent of the site's problems.



USER TESTING

Is the site accomplishing its goals?

Aim to test the website with at least 10 users and as many as 100.

There are user testing options for all budgets even if the budget is zero.

METHODS



What are your options for testing the site?

Small focus groups of target audience members may provide you with in-depth feedback. Your web vendor may be able to manage this task. If your website project doesn't have a user testing budget, you may ask a member of the project team to moderate an informal focus group of board members, volunteers, donors and community members.

There are various free or low-cost user testing services such as Usabilia.com and Userfly.com that will let you track and remotely record a few test users' screens as they interact with your site.



WEBSITES ARE ALWAYS EVOLVING

When should your organization conclude the testing phase?

Web professionals don't work to achieve "perfect", we work to achieve versions.

Consider this version at launch version one and plan to eventually create subsequent versions with improved features.

In other words, go ahead and launch your site as it is.

LAUNCH

Finally, the website is ready and open for business!

WHAT IT IS

Your web developer will either move the new site's files into the current site's location, or update your URL to point to the location of the new site.

WHY IT MATTERS

Updating a URL to point to a new site can take anywhere from two to 48 hours to complete. If something is wrong with your new site, it may take just as long to roll back to the old site. Ensure that your site is ready for primetime before releasing it.



LAUNCH CHECKLIST

What should your project team have in place before launching the site?

See the appendix for a launch checklist for your project team and your web vendor to use as you get ready to launch your site.

PAD THE TIMELINE

When should you launch the site?



Don't plan your website's launch too close to a big event.

Pad the timeline with plenty of room. Hope to launch early, be prepared to launch late.



ANNOUNCEMENT

How should your organization tell your community about the new website?

Prepare an announcement for use in your newsletter, social media and email marketing to your board and community partners.

In your announcement, explain how the new site will benefit its intended users.

THE "OLD" SITE

What happens to the current website?



Wave goodbye to the old website, and save a copy of all the site's files. Keep these on hand for at least a year.

Take screenshots of the old website and save those separately, and for posterity.

TRAINING

Train staff now, and plan to train staff again later.

WHAT IT IS

Set aside time to show your staff how to make routine updates to the new website. Document the training, and offer it again in a few months to ensure that staff keep skills fresh and new staff are ready to participate in the website.

WHY IT MATTERS

Training more than one staff person will protect your organization in the case of staff turnover. You can also use subsequent website trainings as informal user groups, and gather feedback and ideas for improvement.



FORMAT

How should your organization train staff?

Whenever possible, offer technology training in-person, in small groups.

Allow people to interact directly with the website.

Encourage people to ask questions.

Train your primary website content manager, and a few other people in different departments.

FILE



How should your organization document the website training?

Use screencast or webinar software to record the screen and the audio of the trainer speaking. Save this recording and use it as a reference when making site updates.



USER LEVELS

How should your organization train different users?

Offer beginner- and advanced-level website training. These trainings can be combined into one session. Simply be clear with users about which tasks belong in which category.

PLAN FOR FUTURE TRAINING



When will your organization have to offer more training?

Be prepared to offer a refresher training (also: an initial training for new staff) in a few months.

The training can also serve as an informal user group where you can gather ideas for new site features or identify bugs.



TUTORIALS

What else can your organization offer to help staff update the website?

Develop a few, simple one-page “how-to” documents. For example, create a one-page document to demonstrate “how to update the latest news on the homepage”.

WRAP UP & DOCUMENTATION

Document, document, document. Then give yourself and your team a well-deserved moment to reflect and appreciate the result of your contributions.

WHAT IT IS

Documentation is the bread of the website project sandwich. Now that your website has launched, document all of the important technical decisions and ideas for future development.

WHY IT MATTERS

By compiling comprehensive documentation, your organization will not be tied to one website vendor. You will be able to upgrade your website at your own pace, on your own budget.



DOCUMENT CUSTOM PROGRAMMING

Ensure that your web developer indicates what custom edits or code s/he implemented on your website.

It may be helpful to ask her/him to explain these custom features to you, and for you to write down a description in your own words, for your files.

DOCUMENT THE BACKUP SYSTEM



Ensure that your web developer has implemented and documented a tool that will regularly backup your site's files and database.

Ensure that the documentation includes the name of the tool, location of the backup files, frequency and instructions for restoring the site using the backup files.



DOCUMENT IDEAS FOR FUTURE PHASES

During #10 Testing, or other phases of this project, your project team or community may have suggested ideas for future versions of the site. Compile these ideas into a document, and continue to add to the list.

PLAN & BUDGET FOR SITE MAINTENANCE/TRAINING



Remember, this is the first version of your site. Include website maintenance and improvements in your organization's overall budget.

Consider including an amount to provide refresher website training or initial website training for new staff.



REFLECT ON WHAT WORKED & WHAT DIDN'T

Debrief with your project team. What processes, tools or methods helped your project team collaborate? When did your team generate its best ideas?

What processes, tools or methods hindered your project's progress? When was your team feeling stressed or overburdened?

Consider sharing your lessons with your entire staff at a brown bag lunch event. Many of your ideas can be applied to other projects or teams in your organization.

THANK EVERYONE WHO HELPED



You worked hard. You contributed your talent. You and your team deserve gratitude.

Take the team out to lunch. Write them each a thank you card. Mention them at the next staff meeting.

APPENDIX A: GLOSSARY

Analytics

Many existing websites (and definitely your new website) track statistical information such as which pages are visited most often, and what words people searched to find your site.

Content management system (CMS)

A content management system allows you to update a website's content via an easy-to-use interface without knowing programming or markup languages. Most modern websites are built using a CMS. Drupal and WordPress are popular CMSs used to build nonprofit websites.

Constituent relationship management (CRM)

A constituent relationship management system organizes information about people that interact with your organization. A record in your CRM might include a person's name, mailing address, email address, issue preference and membership status. CiviCRM is a popular, open-source CRM tool used for nonprofit websites.

Content strategy

Content strategy refers to the creation of articles, images, and features specifically to achieve your site's overall goals.

Conversion

Conversion refers to the completion of a measurable goal-related action by a user of your website. Examples of conversions include donations, email newsletter subscriptions and action contacting legislators.

CSS (Cascading Style Sheets)

CSS works with HTML to style the site's text and layout. For example, CSS can determine the size, color, font and spacing of your page's title.

Design

The design of a website includes its colors, fonts, images, and styles. It may also include the way in which some features work. For example, an effective website design may provide a "loading" image while waiting for a download to complete. It is separate from the way your site is built.

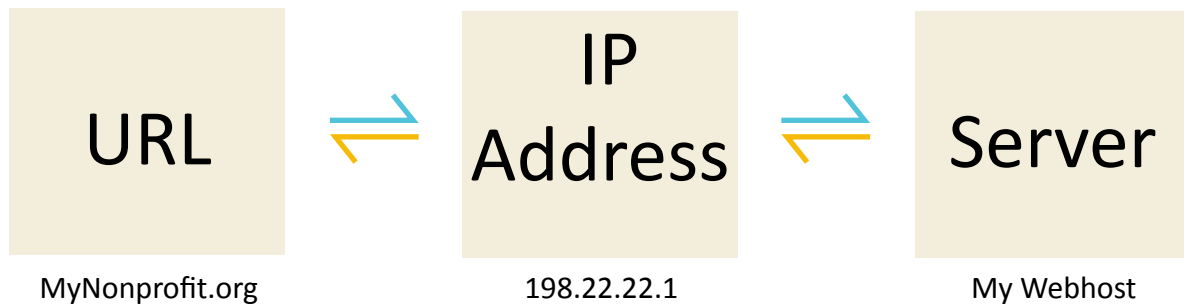
Development

Web development is the manipulation of HTML, CSS and programming languages to create the functions and features of a website. It is separate from the way your site looks.

DNS (Domain Name Server)

Your site's domain and webhost connect via DNS settings. Often, you will log in to your domain registrar to update or view your

site's DNS settings. DNS settings may also affect email addresses attached to your domain name.



Domain

Your site's domain is the address that users will visit to view your content. You may have several different domains pointing to the same website. You will register your domain with a domain registrar and pay an annual fee.

Drupal

Drupal is an open-source content management system. It can manage sites of all sizes, including the White House's site. More information at Drupal.org.

HTML (Hypertext Markup Language)

HTML is the language that tells your web browser what to display when you visit a website. HTML is not a programming language. For example, the HTML for a page may say `<h1>This is the title</h1>` and your web browser will display: This is the title

Landing page

A landing page is focused on a single task, such as "download a whitepaper" or "sign up for our campaign." The content and design of a landing page is streamlined to only include compelling information about the intended task. A landing page on your site will look very different than other pages.

Module

Drupal refers to specialized, additional functions as modules. An example of a module might be a calendar feature or a tool that lets you customize your site's menu.

Open source

Open source software is developed and maintained by a community of developers and is offered with a free license to all users.

Plug-in

WordPress refers to specialized, additional functions and plug-ins. An example of a module might be a calendar feature or a contact form tool.

Responsive

A responsive website detects the size of a visitor's screen and adjusts its content accordingly. For an example of a responsive site visit BarackObama.com using a computer and a mobile device. You will see a different format on each device, though you are viewing the exact same page.

Site map

A site map organizes your site's content into logical main categories, sub-categories and pages. (A site map does not indicate how your site's content and features will be organized on a page, or how the site will be designed.)

SSL (Secure Socket Layer)

SSL allows users to transmit confidential information, such as credit card information, via your website in a secure manner. Many third-party payment processors, such as Google Checkout and Eventbrite, use SSL to safeguard information.

Template

WordPress refers to custom layouts or designs for websites as templates.

Theme

Drupal refers to custom layouts or designs for websites as themes.

User interface (UI)

User interface applies to almost anything, from cars to jar openers to websites. For websites, user interface refers to the site's menu, layout, page titles, buttons, etc. As a project leader, you will strive to ensure that your website has a simple, intuitive user interface that helps users navigate the site and complete their intended action.

Webhost

A webhost vendor provides the physical location for your website's files. Your organization will pay a monthly or annual fee for space on one of the webhost's servers.

Wireframe

A wireframe represents the layout of a website without any design elements, such as colors, fonts or logos. A wireframe allows you and your vendor to discuss the placement of major elements of the site and explore how specific functions will work.

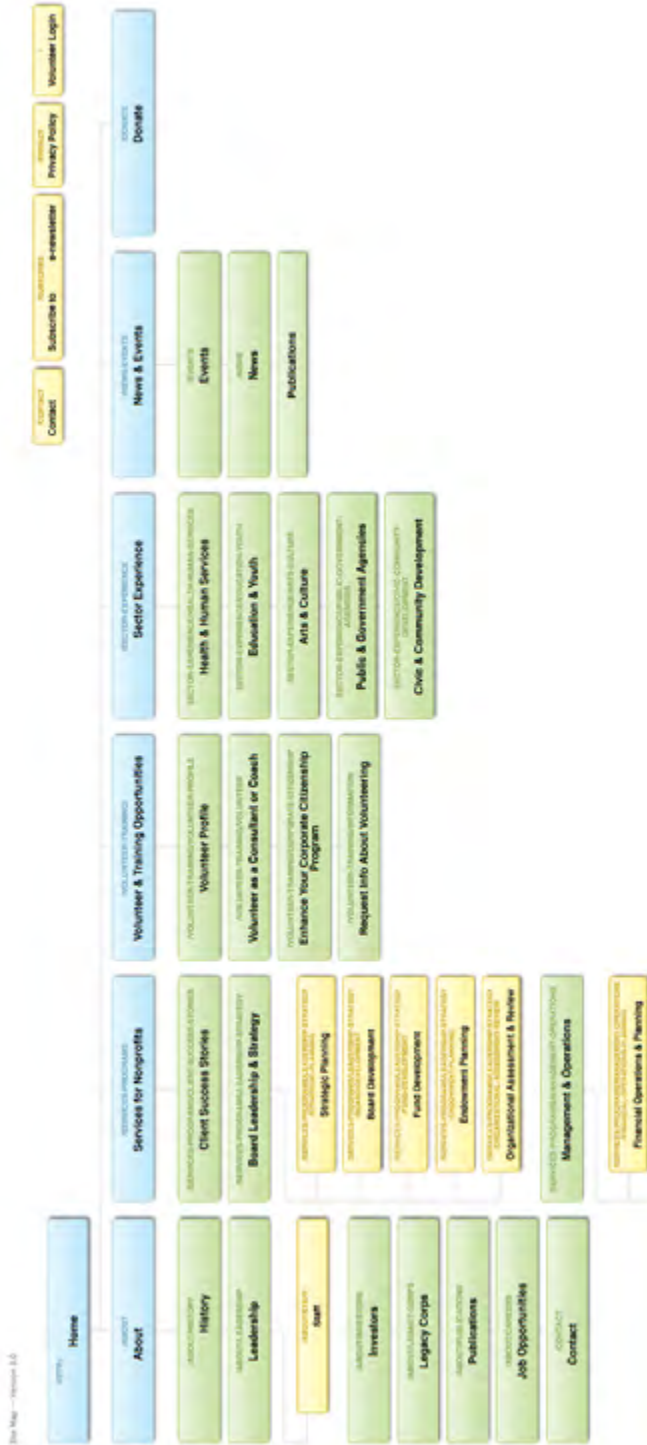
WordPress

WordPress is an open-source content management system. It was originally built to manage blog sites. More information at WordPress.org.

APPENDIX B: SAMPLE TIMELINE

| | |
|-----------------|---|
| May 10, 2012 | Kickoff phone call and Discovery |
| May 11-14, 2012 | Vendor reviews website analytics and site content |
| May 17, 2012 | Vendor delivers proposed technical requirements and site map |
| May 24, 2012 | Client provides feedback on technical requirements and site map |
| May 31, 2012 | Vendor delivers proposed wireframe |
| June 7, 2012 | Client provides feedback on wireframes |
| June 14, 2012 | Vendor delivers proposed design |
| June 15, 2012 | Vendor begins web development |
| June 21, 2012 | Client provides feedback on design |
| July 12, 2012 | Client begins website review |
| July 18, 2012 | Vendor incorporates final round of ESC edits into website |
| July 25, 2012 | New website launches |
| July 26, 2012 | Website training for staff |

APPENDIX C: SAMPLE SITE MAP



APPENDIX D: SAMPLE WIREFFRAME

The wireframe shows a website layout with a top navigation bar containing a logo placeholder, 'Contact', 'Volunteer Log-in', and a search bar. Below this is a secondary menu with 'About', 'Services for Nonprofits', 'Volunteer & Training Opportunities', 'Sector Experience', 'News & Events', and 'Donate'. The main content area features a large text block on the left and a large image placeholder on the right. Below the text block is a row of three buttons: 'Services for Nonprofits', 'Volunteer & Training Opportunities', and 'Sector Experience'. The right sidebar contains a 'Sign Up for e-newsletter' form, a 'Client Success Story' section, a 'Case Study Title' section, an 'Events' section with a 'First Event Title' and date, and a 'Join the Conversation' section with social media icons. The bottom of the page has a 'Sponsor Area Title' with two image placeholders.


Contact | Volunteer Log-in

About Services for Nonprofits Volunteer & Training Opportunities Sector Experience News & Events Donate

1 1 1

Services for Nonprofits Volunteer & Training Opportunities Sector Experience


Article Title



Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat

[Read more >](#)


Article Title



Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat

[Read more >](#)

Article Title





Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat

[Read more >](#)

[All Updates >](#)

Sponsor Area Title



APPENDIX E:

SAMPLE LAUNCH CHECKLIST

- Is favicon.ico uploaded?
- Is robots.txt customized and updated?
- Are the meta tags customized and updated?
- Does the HTML validate without errors?
- Does the CSS validate without errors?
- Do images on the site have meaningful ALT tags?
- Is the privacy link active and available from every page?
- Does the footer contain copyright information?
- Has the spelling and grammar on each page been reviewed?
- Is the site free of broken links?
- Does the site look good in Internet Explorer?
- Does the site look good in Safari?
- Does the site look good in Chrome?
- Does the site look good in Firefox?
- Does the site look good on an iPhone?
- Does the site look good on an iPad?
- Does the site look good on an Android device?
- Does the site look good on a Blackberry?
- Has google analytics been installed on the site?
- Is the site's backup system running?
- Have any necessary .htaccess redirects been set up?
- Has a new site map been submitted to search engines such as Google?
- Have all forms on the site been tested?
- Does the RSS link work?
- Does the search function work?
- Has the site's documentation been compiled?
- Does the web vendor have access to the final webhosting account?
- If it exists, has the previous website been backed up and saved elsewhere?

THE NONPROFIT WEBSITE PROJECT
HANDBOOK

[HTTP://SMARTCAUSEDIGITAL.COM/WEBSITE-HANDBOOK](http://smartcausedigital.com/website-handbook)