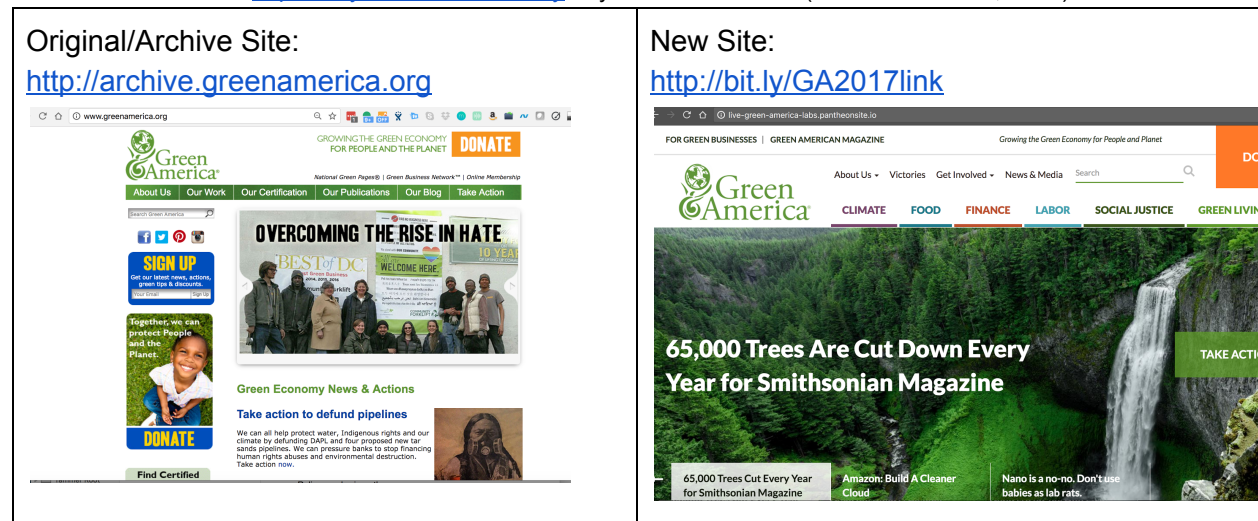


Link to this document: <http://bit.ly/GA2017casestudy> - by Monica S. Flores (version 1: June 6, 2017)



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## Background

Green America is a non-profit 501(c)(3) organization that organizes the work around a "Lens" such as Food, Climate, Labor, Finance, with programs inside each Lens, with Campaigns associated with each Program, and Actions associated with each Campaign. The organization is based in Washington DC and has a \$3.5 mm budget and ~40 people working with the team.

There are a number of "sister" sites such as the Green Business Network, the Center for Sustainability, GMO Inside, and published magazines that we are slowly integrating to be managed all inside the one content management system.

The website was built originally in ColdFusion and moved to Drupal 8 on Pantheon.

Downloadable files:

<https://drive.google.com/drive/folders/0B2YKGxfUoMTCCcUpkNmpNc3NTdDg?usp=sharing>

## Timeline

June 2016 - Hired digital director

July - RFP process → requests sent around to design firms

August 1- RFP deadline, 17 proposals submitted

August 8 - First round review, 8 proposals under consideration

August 15 - Second round of review, 4 proposals under consideration

August 20 - References checked, and all finalists have had 20-minute interviews

August 23 - Project Review Board met to decide on final recommendation (11 ayes)

August 24 - Present to Executive Director

August 31 - Preliminary contracts drafted

September 10 - Kickoff meeting

September 27 - On-site Deep Dive (Content Discovery, User Personas, Architecture)

October 13 - Wireframes #1

October 27 - Wireframes #2

November 15 - Homepage Version 1

December 5 - Homepage Version 2

December 12 - Consult with greater Project Review Board ( [notes from team](#) )

December 15 - Feedback Due to Web Development Group

December 30 / January 5, 2017 - Homepage Final Version expected

February 15 - Initial themed wireframe

March 15 - Trainings to Staff

April 15 - Pre-rollout scrums

May 11 - Initial Team Rollout

Week of May 15 - pre-launch to internal team / bug hunt / integration with Charity Engine

June 15 - launch

Post-launch - move into Phase 2 of work

## Original RFP

[PDF of original RFP](#) was circulated to a shortlist of design firms that had experience and past portfolios working with environmental groups, nonprofits, and/or organizations of our size.

## Budget

\$150k grant from family foundation and other donors

\$35k for design

\$70k for theming and architecture

\$5k for external imports of data from other sources

## Provider Reviews

### WDG

WDG for the design process - very happy with the delivered results.

<http://wdgdc.com> | <https://clutch.co/profile/wdg#review-138636>

### MAAN Softwares Inc.

MAAN Softwares Inc. for theming and back-end work - very pleased with results, also they were helpful with our database imports and conversions from Wordpress, Joomla, mySQL.

<http://maansoftwares.com> | <https://clutch.co/profile/maan-softwares#review-150341>

## Internal Tools

- **Trello** - overall project planning
- **Google Docs** - to manage external discussions
- **Sharepoint** - to collect internal staff feedback and keep teams organized
- **Invisio** - delivered designs
- **JIRA** - ticketing and feedback

## Core Website Team

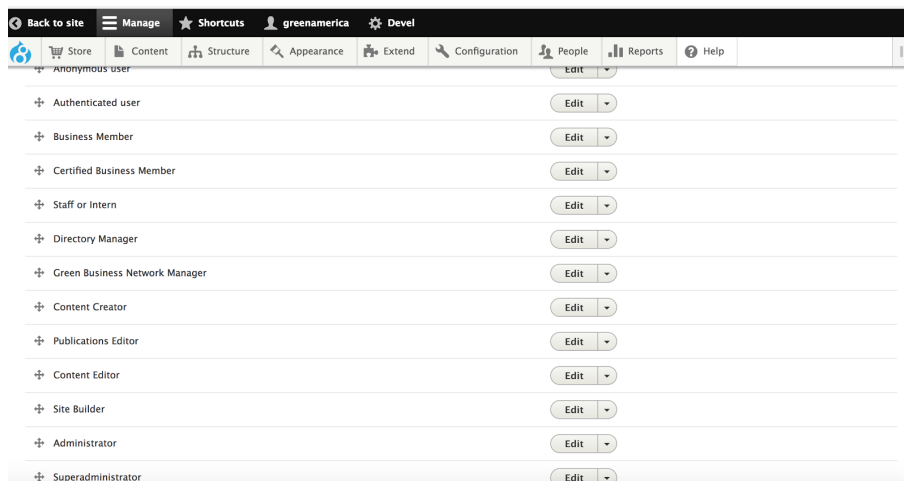
- Alec Badalov, Online Communications Associate
- Dana Christianson, Memberships Marketing Director
- Monica S. Flores, Director of Digital Products
- Eleanor Greene, Associate Editor and Digital Content Manager
- Shireen Karimi, Online Communications Manager
- Todd Larsen, Executive Co-Director for Consumer & Corporate Engagement

Additional Staff were also consulted, including “lens” managers for food, finance, labor, climate, social justice, as well as Green Business Network manager, as well as Print Magazine editor, as well as 8 interns during the course of the project.

## Third-Party Integrations

- **Salsa** - for handling mailing
- **Raiser's Edge** - donor management
- **Charity Engine** - webform donation pages
- **Timberlake** - membership management (business members)
- **Wordpress** (hosted and self-hosted) - integration (export from Wordpress and import into Drupal)
- **Joomla** (self-hosted) - integration (export from Joomla and import into Drupal)

## User Roles



Back to site   Manage   Shortcuts   greenamerica   Devel	
Store   Content   Structure   Appearance   Extend   Configuration   People   Reports   Help	
Anonymous user	Edit
Authenticated user	Edit
Business Member	Edit
Certified Business Member	Edit
Staff or Intern	Edit
Directory Manager	Edit
Green Business Network Manager	Edit
Content Creator	Edit
Publications Editor	Edit
Content Editor	Edit
Site Builder	Edit
Administrator	Edit
Superadministrator	Edit

- **Anonymous** = visitors
- **Authenticated** = anyone with a username and pass
- **Business member / Certified Business member** = members who are from the Green Business Network
- **Staff/intern** = staff and interns
- **Directory manager** = handles “directory” items such as lists of organizations
- **Green Business Network manager** = handles GBN pages and users
- **Content Creator** = Can submit content
- **Publications Editor** = manages the Magazine and other magazines
- **Content Editor** = Can submit and EDIT content
- **Site Builder** = general site content manager
- **Administrator** = full management of site
- **Superadministrator** = full access

# Content Types

- **Basic page:**  
Use basic pages for your static content, such as an 'About us' page.
- **Lens:**  
A "Lens" is the way that Green America organizes its overall goals and streams of work.
- **Campaign:**  
Green America's campaigns are the heart of our activism and advocacy work, where we mobilize constituents, members, and individuals to work towards specific desired outcomes.
- **Program:**  
Green America engages in long-term programs (3-5 year time horizon) that are part of an overall LENS of work.
- **Action:**  
Actions are specific actions taken by Green America constituents
- **Victories:**  
Victories are successes that Green America has completed

=====

- **Blog/News:**  
Green America blog posts or news items.
- **Piece:**  
Use pieces for content related to the Lens, such as as an informational scorecard, report, or other content that posts directly to the Lens.
- **Press Release:**  
Green America press releases
- **Media Mentions:**  
Green America in the news
- **Media Sources:**  
Original sources for media mentions

=====

- **Green American Magazine:**  
A single magazine issue
- **GAM Article:**  
Article from the Green American Magazine
- **Green Living Piece:**  
Green Living evergreen pieces

=====

- **Green Business Network Listing:**  
GBN Listing includes logo, name of business, description, categorization, address & map
- **Green Business Network Standard:**  
Standards are how the Green Business Network assigns certification to network members.
- **Member Story:**  
Use this to highlight member stories.
- **Coupon Code:**  
Coupon codes are submitted by Green Business Network members to be attached to their GBN listing.
- **Advertising:**  
Banner and sidebar ads uploaded by GBN members

=====

- **People:**  
Green America people are staff who work for the organization. One Person may have multiple Positions associated with them.
- **Positions:**  
One Person may occupy multiple Positions. A position is a title or organizational role, such as "Executive Co-Director for Business, Investing & Policy"

=====

- **Subsite Page:**  
Subsite content are Green America daughter or sister sites that are meant to be collected into one "subsite", such as Break Up with your MegaBank, or Green Business Network. Use templates to control of separate categories of subsites.

- **Secondary Call to Action:**

Secondary calls to action are used by subsites and other sections of the website.

=====

- **Directory Listing:** Directory items with a name, address, website, and map link (used for a map to "Break up with your MegaBank)

=====

- **Frontpage Slideshow:**

Frontpage Slideshow items

- **Highlight:**

Highlight Item for Frontpage

=====

- **Content Link:**

May be used where there is a need for an off-website link

- **Donation Link:**

Used for different donation links throughout the site

- **Image:**

Images to use throughout the site, such as PNG, JPG, and GIF files.

- **File:**

Upload a file such as a PDF, Doc, XLS, CSV, or other type of file, such as a report that is to be linked from other pages.

- **Product:**

Use products to represent items for sale on the website, including all the unique information that can be attributed to a specific model number (Ubercart)

- **Webform:**

A basic page with a webform attached.

# Drupal Modules

address	masquerade
admin_toolbar	metatag
better_exposed_filters	node_limit
block_class	nodeownership
bootstrap_layouts	<b>owl-carousel</b>
bootstrap_library	panelizer
colorbox	patch.txt
config_update	pathauto
country	redirect
crop	respondjs
ctools	<b>roleassign</b>
customerror	scheduler
devel	search_api
ds	search_api_pantheon
editor_file	search_api_solr
entityqueue	sharethis
faq	simple_sitemap
features	simplify
feeds	sitemap
field_group	smtp
<b>filter_perms</b>	social_login
flag	social_media_links
fontawesome	super_login
gathercontent	superfish
geocode_lookup	tagclouds
geolocation	token
google_analytics	ubercart
image_widget_crop	views_slideshow
imce	webform
inline_entity_form	weight
layout_plugin	
libraries	



## Designs

Originally in invsio. Final approved files sent as fonts, assets, PSDs.

### User Personas:

Sketches of “user personas” who visit the current site, provided by our internal team (PNGS and JPGS)

<https://drive.google.com/open?id=0B2YKGxfUoMTCbmk3eGZ1Y0IJQXc>

### Wireframes (various PNGs):

Delivered from WDG after iterative processes to understand sitemap and content architecture

<https://drive.google.com/open?id=0B2YKGxfUoMTCUW9MWjFZVTRkMWM>

### Homepage (PDFs):

V1: <https://drive.google.com/open?id=0B2YKGxfUoMTCQWZTWIVvQXdhZGM>

V2: <https://drive.google.com/open?id=0B2YKGxfUoMTCazJ6SkxJSXJZeVU>

V3: <https://drive.google.com/open?id=0B2YKGxfUoMTCb3pSeGR0MmZaeWc>

### Content Types (HTML Files so you can see the fields of each content)

Download this large zip file then unpack for HTML versions of each content type:

<https://drive.google.com/open?id=0B2YKGxfUoMTCY3FjWFQ1NDhOTkE>

### Final Approved files (JPG):

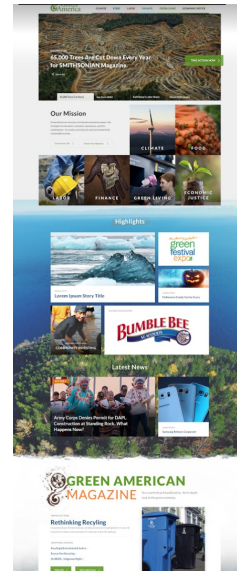
<https://drive.google.com/open?id=0B2YKGxfUoMTCbEJZQmEzZE5qUWs>

**From Web Development Group WDG:** [hello@wdgdc.com](mailto:hello@wdgdc.com)

### Theme File (with template twig files):

<https://drive.google.com/open?id=0B2YKGxfUoMTCOXA0b182WGV3ZVk>

**From MAAN Softwares Inc.:** [services@maansoftwares.com](mailto:services@maansoftwares.com)



## Additional Links

5 Learnings about the Website Redesign Process:

<https://medium.com/@monicadear/5-learnings-about-the-website-redesign-process-9f0499d8ee7f>

Presented by Monica S. Flores <http://linkedin.com/in/monicaflores>