



## CAREB-ACCER Website Work Agreement

1456511 Ontario Limited o/a Upper Rapids (hereinafter called "the Developer") will redevelop the website for CAREB-ACCER Canadian Association of Research Ethics Boards. (hereinafter called "the Client"):

1. **Developer Fees and Payment Schedule:** Client shall be charged the following fee by the Developer in exchange for the Services and Deliverables (the "Fee"):

**Work will occur in two week sprints.** The Client will be billed for the completed components created every two weeks from the start of development at the hourly rate of **\$120 per hour + HST**. At the two week mark the Client will receive a breakdown of the completed tasks and a list of upcoming tasks. The Client is free at this time to re-prioritize this list, add to it, or remove items.

This process will continue until the site is in a launch-ready state. If any two invoices are unpaid at a given time work will cease until the account is made current. The new site will not launch until the final invoice sent is paid.

**Post Launch,** the Client will be offered the option of establishing the recommended Monthly Maintenance plan with Upper Rapids which will include hosting costs, or paying for hosting at the Pantheon platform directly without a maintenance plan. If the Client wishes to use a hosting provider other than Pantheon, the Developer can work to **redeploy** the website to that host at the regular hourly rate.

2. **Delivery Schedule:** The first development sprint will commence on **Monday, October 26** and will be invoiced on **Monday, November 9**. Subsequent sprints will be scheduled according to the process outlined above.

3. **Description of Services:** Developer shall upgrade the Client's existing website located at the URL [www.careb-accer.org](http://www.careb-accer.org) (the "Website"), to add the functionality as outlined in Appendix A.

4. **Description of Deliverables:** Developer shall deliver the following Deliverables to the Client:

4.1. A fully functioning website optimized with responsive design for mobile devices. The Website shall include the features as detailed in Appendix A.

5. **Performance Criteria:** The Deliverables must meet the following performance criteria:

5.1. The Website must function properly across multiple modern browsers, including the current desktop versions of Internet Explorer, Chrome, Firefox, and Safari.

5.2. The Website must function properly across multiple devices, including laptops, desktops, tablets and mobile phone devices. The current iOS and Android versions of Safari and Chrome will be used for mobile testing.

6. **Out of Scope:** Items considered out of scope will be quoted and billed separately:

6.1. Any creative content not generated by the Client, including any as 3rd party provided copywriting, photography, videography, or consulting.

6.2. Costs for any hardware, software licenses or technical services provided by third parties.

### 7. **Open Source**

Open Source Software means publicly available software that may be utilized pursuant and subject to the terms of an

"open source" or similar license, including without limitation the "MIT License," the "Apache License" and the "GNU General Public License." The Client understands and agrees that the Developer may, at the Developer's discretion, make use of libraries from various Open Source Software products during the course of work. The Developer may submit back to such libraries any improvements ("patches") made to the Open Source Software during the course of work, as long as the submission of such patches violates neither the conditions in this agreement, nor the confidentiality or intellectual property of the Client.

**8. Confidentiality**


The Developer agrees to maintain in confidence the Client's confidential and proprietary information, and not to disclose or use such information other than in connection with services and deliverables above.

**9. Termination**

This Agreement is effective as of the start of service, and shall continue until terminated, either immediately due to a material breach or either party's bankruptcy, insolvency or assignment for the benefit of creditors, or upon thirty (30) days written notice by one party to the other for any other reason. The termination or expiration of this Agreement shall not relieve the Client of its obligations to pay the Developer for any Services rendered or expenses incurred prior to termination, or relieve the Developer's obligation to maintain the confidentiality of the Client's information.

I agree with the terms and project scope set forth in this website development agreement. The Client wishes to proceed with this work.

**CAREB - ACCER**

Signed:   
Name: LORI A. WALKER  
Date: Sept 29/15

**1456511 Ontario Limited o/a Upper Rapids**

Signed: \_\_\_\_\_  
Name: \_\_\_\_\_  
Date: \_\_\_\_\_

## Appendix A: Website Features

This is a list of new features or enhancements to existing features on the current careb-accer.org website. Existing features on the site which are not undergoing significant redevelopment may not be listed. Existing features not listed here will remain in place. Please see the proposal document for a detailed description of these items.

- Migration to the Drupal 7 content management system from the existing Drupal 6 / CiviCRM site.
- Responsive website design ("mobile friendly")
- SEO redirects of major URLs from old website
- Front page news teasers and detailed news archive.
- Social media integrations
- User account management
- Members only sections with content restricted by role to logged in users, managers, and administrators
- Membership dues tracked and processed via the site's e-commerce system
- Member certification assignment
- Event listings and event registration functionality
- Payment processing via PayPal or Stripe
- Document repository
- Members discussion forum
- Recently filed comments section with PDF uploads
- English / French multilingual functionality

Estimated hours for this list of features is **132**.



# CAREB-ACCER

Canadian Association of Research Ethics Boards  
L'association canadienne des comités d'éthique de la recherche

August 20, 2015

# Draft Vision & Scope

## Preamble

CAREB-ACCER has requested a quote to build a new organizational website to replace the existing site found at [www.careb-accer.org](http://www.careb-accer.org). The new site will feature a streamlined and revamped version of select aspects of the current site, most notably member registration, dues and event registrations. Select content, including membership lists, will be migrated from the current website.

Upper Rapids' boutique web development service specializes in providing thoughtfully designed websites customized to meet a client's vision and operational goals. All of our websites are built upon Drupal, a non-proprietary Open Source Content Management System.

We have prior experience building membership-driven websites with e-commerce components for organizations such as the Niagara Association of Realtors at [www.niagararealtor.ca](http://www.niagararealtor.ca), and reThink Green at [www.rethinkgreen.ca](http://www.rethinkgreen.ca). Utilizing the strengths of the Drupal CMS, we work with our clients to determine business rules and workflows to best manage controlled access to content.

# How We'll Work Together

## 1. Current Website Audit

Before making any decisions about the new website, we'll take a look at your current analytics. We'll be looking to see which pages are performing well, where your referrals are coming from and which search terms are bringing people to the site. We'll need this information to leverage what's working and make sure those existing entry points work well on the new website.

## 2. Current Website Teardown Working Session

In this workshop, Upper Rapids and CAREB meet for a deep discussion of online strategy, identifying stakeholders and goals for the new website. The content and navigation of the old website will be analyzed and re-sorted according to these priorities. In this meeting we will create a "tactile design" of the site on paper, identifying all relevant sections and placement of navigation items. Key performance indicators and primary Calls to Action for the new site are determined in this meeting as well.

## 3. Design and Artwork

Upper Rapids builds websites with strong technical foundations and we'll work to incorporate CAREB's newly designed brand assets to build a creative direction for the site. We do not employ an in-house graphics designer at Upper Rapids.

If the services of a designer is required, we partner with a select group of amazing Canadian graphics design firms to produce front end visuals. If a designer is required a quote will be obtained. Any professional design, photography, stock images or videography required for the website will be considered additional material costs and are not included in the scope of work provided in this document.

## 4. Copywriting & Migration

Text from the existing site can be used as a starting point for the text on the new site, with the existing text cut or reorganized based on the results of the meeting in step #2. The text we're going to keep will be loaded into the new content management system by Upper Rapids staff. Users on the existing site will also be migrated into the new site.

If a significant amount of text needs to be rewritten, a professional copywriter can be brought in on an hourly basis to clean up the wordage.

## 5. The Build & Testing

Upper Rapids builds the functionality of the new website and applies the design to this back end. We build the site on a development server while CAREB keeps track of our progress on a separate testing server. Once we've tested the website and we're ready to roll, an IP address of the live production server will be provided and we'll point the URL to the new site.

# Website Deliverables

## Suggested Initial Deliverables List

**Open Source content management system:** A world class Content Management System will be configured as the foundation of the website. The website will be based on Drupal, a mature, secure and robust content management system, and the same which powers both the White House website and Amnesty International. This system is nonproprietary and is not tied to Upper Rapids's servers. CAREB will be free to move the site to any hosting environment they wish and employ any developer to do future work on the site. CAREB will have access to all source code used on the site. The technical underpinnings of Drupal are PHP, Javascript and MySQL.

Drupal will allow all content to be editable by CAREB staff with the appropriate account privileges.

**Main Navigation Areas:** The home page will feature a navigation menu with a layout to reflect the site outline to be determined in discovery meetings between Upper Rapids and CAREB staff. The navigation menus will gracefully collapse on the mobile version of the site to a single dropdown (or slide-out) version which will be easier to use with a touch-based mobile phone.

**Responsive design for mobile:** The site will be built according to a "mobile first responsive design." All elements added to the site will gracefully scale down and adapt to the size of the screen. Our solution is device agnostic, meaning that if a new phone or tablet is introduced in the ensuing years with a different screen size, the design will gracefully adapt to it with minimal developer intervention.

**SEO Redirects of major URLs from old website:** As the current website url has been around since 2009 the pages from the site have been indexed by Google and other search engines. It is important that the old site pages gracefully redirect to their equivalent on the new site. For example:

If the old website has the page: <https://www.careb-accer.org/content/policies-guidelines-and-best-practices> and the new site has that content available at <https://www.careb-accer.org/members/policies> then visiting the old URL should redirect the visitor's browser to the new one.

We will determine a list of the most visited and linked-to pages on the old site to create a redirect list for the new site. This will also help Google find and index the new pages, minimizing the time it will take Google to get the new site into search results.

**Standard Page Layouts:** The layout of each page will be standardized to utilize common font size and text layouts to maximize readability, accessibility and ease of management. Each page will be built according to the HTML5 standard, which will ensure that, under the hood, the pages are available to screen readers for the visually impaired and to Google for efficient search indexing.

Common elements determined in the tear down session will be provided as fields in the editing interface on each page so that CAREB staff can concentrate in providing good information and not on the particularities of single page layouts.

**News:** Horizontally stacked front page news teasers will utilize smart criteria to manage their display. A detailed news section will exist internally on the site. All news archives from the old website will be migrated over.

**General Contact Us:** A contact page will feature a form which sends inquiries through to one or more CAREB contacts. All inquiries will be tracked and stored by the website's database for future download or export to Excel.

**Social Media Integration:** Social media integration on each page will be available for the prevalent social networks including Twitter, Facebook, Instagram, Tumblr, Pinterest, Reddit and Google+. This will allow the audience reading individual site pages to quickly and simply pass a link to the content to their friends and followers on the world's prominent social networks. Links to CAREB's own profiles in social networks will be displayed in the header of every page. The site will also properly utilize protocols to optimize how pages shared to Social media are presented. Embedded feeds from CAREB's social profiles can be included in pages as appropriate.

**User Account Management:** The client will be given access to manually create new user accounts on the site, assign the appropriate permissions, and send new account email notifications. A "Request New Password" form simplifies password management and resets. Logged in users will be able to edit their account details. A registration form for new users to request access will be provided with registration fields to be determined.

**Members Only Section:** Utilizing the strengths of the content management system, access to content, documents and events will be restricted based on roles like 'public' 'members' and 'administrators'. All membership data from the exiting site will be migrated to the new site.

**Membership Dues:** The website will be able to track which users have valid memberships and will be able to process membership dues via the e-commerce system. Credit card numbers will not be stored so users will need to enter their payment information at each cycle. The exact workflow of this process can be discussed prior to this section being built. Members with invalid memberships will still be able to log in to purchase their membership, but may have access restricted from other members-only data.

**Member Certifications:** Administrators will be able to assign Certifications to members. The list of member certifications can then be listed in the appropriate area on either the public-facing front end or the members-only section of the site as required.

**Event Listings and Registration:** CAREB events, such as the annual conference, can be listed in a public events section of the website. Registration for events can be collected from either existing members or the public and payment for events can be processed via the e-commerce system. The conference will be built based on past experience collecting conference registrations so that the registrations generate the appropriate reporting.

**Payment Processing:** Integration with a payment processing provider like Paypal or Stripe will allow the site to manage payments for membership dues and event registrations in a secure manner, ensuring the processing, transmission, and storage of credit card data complies with the Payment Card Industry Data Security Standards (PCI DSS).



**Document Repository:** A document repository for the public, members and administration provides an area for uploading, downloading and sharing of documents in a secure manner, restricting access using the appropriate role permissions.

**Forum:** Threaded discussion boards will allow members to discuss topics and share information. Discussions will be archived and searchable. Members will be able to subscribe to email updates for individual discussion threads.

**Recently Filed Comments:** A record of filed comments with file uploads (PDF) will be established on the site. These comments can optionally be listed on the front page in a "recent activity" section.

**Multilingual English / French:** The site will be built upon Drupal's multilingual features with English setup as the default language and French available for translation. A human translator will be required to enter actual translations of content. The back-end site interface will be automatically translated.

**Estimated Hours:** 132

Estimation includes research, design, development, QA and an overhead for project management.

## Development Environment & Hosting

Upper Rapids develops, and recommends hosting, our projects on Pantheon.



Pantheon is not just hosting—it's a website management platform tuned especially for Drupal. Pantheon provides us with three servers for a site: a development environment, a private testing server for previewing changes and new features, and the live production server. As your needs change, we can quickly start developing new features and test them in the exact environment they'll appear live. Development and testing has no impact to your live site. No extra time or costs are incurred to build out this development environment.

**Your site will be built with best-practice workflows on Pantheon. Here's why you should keep it there.**

Pantheon ensures your website will continue to perform at high speeds and with minimal need for support. The platform automatically does much of the work required to keep professional-grade Drupal sites fast, secure, and scalable.

We recommend utilizing Pantheon for hosting for five reasons:

**1. Best value for your money**

As the servers are entirely managed by Pantheon, 100% of your future website investments can go to important development work, rather than infrastructure upkeep.

**2. Iron-clad security for your site and data**

Pantheon makes continuous platform-wide upgrades so you don't need to ask a developer about Heartbleed, Internet Doomsday, or other risks du jour. Pantheon also enables our developers to quickly update your site in one click when security updates to the CMS are available.

**3. Best website performance out there**

For every second visitors wait, conversions drop 7 percent. Pantheon is tuned to deliver the fastest performance possible. Third-parties like Loadstorm rate Pantheon as #1 in performance and reliability.

**4. Easy and immediate scaling**

Traffic spikes or unexpected popularity are not a problem for sites hosted on Pantheon. The system is architecture to rapidly and transparently to visitors scale up or down resources as required.

**5. Unrivalled support from website experts**

Pantheon employs experts Drupal performance and unlimited support tickets are available to customers. There are no server infrastructure concerns to tie up support resources.

Pantheon plans start at \$25 USD a month. If CAREB wishes to use a hosting provider other than Pantheon, Upper Rapids can work to **redeploy** the website to that host at our hourly rate.

# Meet the Band

## Small Team, Big Community

Upper Rapids is a nimble team lead by software developer Adam White. We consider ourselves a boutique developer, meaning we work with a select few clients at a time and focus on delivering quality custom work, not building as many cookie-cutter sites as possible. While we're a tight unit we leverage a massive, active and helpful Open Source software community to deliver sites that are built to the best industry standards.



**Adam White** Web Developer / Partner in Upper Rapids

**Expertise:** Drupal, PHP, Javascript, Content Management, Social Media Trends

**Education:** Bachelor of Computing with a minor in Sociology (University of Guelph)

Adam spearheads the Upper Rapids brand, a division of the respected and established Niagara IT consultancy JMR Logics, in which he's a partner. As lead web developer he helps businesses establish their online presence and manage content with Drupal-based websites. He's worked exclusively with the Drupal CMS since 2010 and prior was JMR's lead Java developer and data architect. Adam's clocked in over 14 years of content management and online publishing experience as the managing editor of Punknews.org, where he also writes, podcasts and promotes independent Canadian music. He's one of the organizers of the Drupal North conference and is a recipient of the Business Link newspaper's 40 Under 40 Business Achievement Award.



**John Riley** Accounts Management / Founder of JMR Logics

**Expertise:** Software Development, Business IT Consulting

**Education:** Bachelor of Mathematics (University of Waterloo)

After paying his dues as a systems analyst in Toronto's banking sector John returned home to Niagara to found the IT consultancy JMR Logics, which recently celebrated over 20 years helping businesses use technology to grow. Business owners, executives and decision makers trust JMR to advise on all aspects of their IT infrastructure from the web to their physical networks. Major long term clients include the Destination Cinema Group of IMAX theatres, the Maid of the Mist boat tours, and the Skylon Tower.



**Sara Smith** Website Content & Application Support

**Expertise:** Client Training, Project Management and Coordination

**Education:** Computer Programmer Analyst (Georgian College)

Sara joined JMR in 2013, bringing over a decade of project management experience, most recently gained in Niagara's manufacturing sector. Sara brings lean thinking to Upper Rapids, maximizing client value via streamlined processes. With a strong focus on supporting end users, she provides training to clients, helping them take ownership of their content management systems and use them effectively.

# Moving Forward

## Hourly Rate

Upper Rapids works at an hourly rate, billed on the 1/4 hour. This rate applies to all development work, testing, deployments, post-launch modifications, and meetings both remote or in-person.

## **\$ 120 per hour +HST**

We break our rate down into 1/4 hour increments and a full accounting of all time spent on the project will be included with your invoices.

## Time Estimate

Notwithstanding the discovery of additional required functionality or changes requested to the deliverables list during the build, our time and materials **estimate** for the website is:

## **132 hours**

This hours estimate includes research, design, development, QA and an overhead for project management. CAREB will periodically have the opportunity to add or remove items from the deliverables list for the site during development. Such changes may effect the actual hours total. Invoicing for the site will reflect the **actual hours** spent.

## Invoicing & Review Schedule

At the start of the development the website components list will be prioritized so the most important components will be scheduled to be created first. We require no down payment to begin work.

Work will be organized into **two week sprints**. At the end of a sprint, completed features will be demonstrated to CAREB and an **invoice will be issued** for the time spent. At this time CAREB will receive a breakdown of the completed tasks and the upcoming tasks. CAREB is free at this time to re-prioritize this list, add to it, or remove items. Adding or removing items will effect the total cost of the project as necessary.

The next sprint will begin based on the new list and this cycle will repeat as necessary.

This process will continue until the site is in a launch-ready state. The new site **will not launch** until the final invoice sent is paid. If any two invoices are unpaid at a given time work will cease until the account is made current.

## Maintenance Plan

A monthly site maintenance plan, addressing periodic software security updates and minor adjustments to site functionality over time will be proposed separately. Establishing a maintenance plan is highly recommended but not required.

## Start Date

Upon the reception of a signed work agreement the development cycle can be scheduled. Delay in approval may result in a later scheduled launch date. Our next open date for project commencement is Monday October 26, 2015.

The launch date will depend on the completion of development, the delivery of any copywriting, artwork and photographs from third parties, client approval and receipt of final payment.

## To Proceed

Please contact Adam White at 905-374-2878 or [adam@upperapids.ca](mailto:adam@upperapids.ca). A work agreement will then be sent for signature.