ODDBIRD

Playworks Website Overhaul

Congruity Works and OddBird are joining forces to re-architect and design the information flow, user experience, overall look-and-feel, and develop additional functionality for Playworks.org such as dynamic content based on location of user. Based on the existing relationship between Playworks and Congruity Works, we are confident in our ability to continue development on a solid and well-understood code foundation offering more for less.

OddBird began in 2008 with three siblings, and has since grown to include experts across the range of design and development — dedicated to building beautiful, effective, and maintainable web applications using open-web technology: accessible HTML5, unobtrusive Javascript, and mobile-responsive CSS styles. OddBird has collaborated periodically with Congruity Works members since 2006.

Congruity Works is a three-person team who can help you think through, develop, and implement web strategies that are in sync with your long-term goals, focusing on serving the needs of the humans who use it. Congruity Works' core services include online strategy, website design, engagement consulting, Drupal development, and software integrations.

Both Congruity Works and OddBird grew up with outdoor recess, and continue to value play in their work and process. Together, we provide a range of

specialties, from information architecture and database schema design to custom graphics, data-visualization, interaction, faceted search tools, and user-experience design. Our approach is personal, and we are able to respond quickly to the changing needs of a project.

With everything we do, it's the human impact that interests us most: what your content represents in real people's lives, and how the resulting tools can integrate into existing daily routines for both maintainers and a wide variety of users. Web sites and applications aren't useful unless they are used, so our process is entirely built around people and collaborations — talking to stakeholders, and testing our designs with real users along the way.

Our Team

We work collaboratively with our clients as a cohesive team, so that everyone understands the scope and goals of the project. With years of experience working together, we are able to provide smooth and efficient progress, test coverage, and continuous review. We do great work, we love what we do, and we have a track record of happy clients to show for it.

UX & Visual Design Team

Our user-experience & design team — [Miriam Suzanne](#), [Sondra Eby](#), and [Stacy Kvernmo](#) — have expertise in product development, content marketing, brand and application design, and accessible front-end code.

Stacy has spent the past 14 years exploring typeface combinations, experimenting with design tools and processes, staying current with the latest interaction design techniques and reflecting on design details. Whether it is sorting through content and research to develop an effective information architecture, designing systems and styleguides, or writing front-end code, Stacy embraces the spectrum of challenges throughout a project. She frequently speaks at design and front-end development conferences and is co-host of a local web design and development meetup group.

Miriam is a pioneer of modern CSS techniques and open-source tools including the popular [Compass](#) framework, [Susy](#) responsive-grid library, and [True](#) testing

library. She has years of experience leading teams in the user-experience design and information architecture process, finding creative solutions that meet the needs of diverse stakeholders. Miriam is the co-author of [SitePoint](#)'s [Jump Start Sass](#), a regularly-invited presenter at front-end conferences, and a multimedia artist with extensive experience in theatre, writing, music, and visual art.

Sondra has been creating custom brands and integrated web graphics for over 12 years. She has lead the marketing teams for a variety of small businesses, and acted as co-founder and Chief Marketing Officer of a health and wellness products manufacturing startup. As CMO, she coordinated two crowdfunding campaigns that both reached over 200% of their goal. Sondra is also a multi-media artist, author, and musician — bringing a unique perspective to audience engagement and interaction.

Development Team

Tim Nafziger has been working with Drupal since 2004. He's worked with businesses, nonprofits, and individuals to use open source tools to reach their audience, and he has 6 years in nonprofit fundraising, outreach, and administration.

[Nathan Eanes](#) has been working on the web for over 10 years and with Drupal since 2009. He has worked on a wide variety of projects, including UX redesigns, e-commerce websites, and enterprise-level nonprofit fundraising platforms. Nathan has been working on Playworks.org since 2014 and has developed a deep understanding of its workings.

Jake Martin White has close to a decade of experience working in nonprofit technology, in both consulting and corporate leadership roles. With expertise in Drupal, CiviCRM, and Salesforce, he has led development of enterprise-class fundraising platforms for binational NGOs, planned and executed strategic CRM deployments, and collaborated on web projects for local grassroots charities.

Our front-end developer, [Jonny Gerig Meyer](#), has been writing clean, well-tested JavaScript web applications for over seven years. He has authored or contributed to numerous open-source projects, and is an active member in the JavaScript community.

[David Glick](#) has been building web-based software for over a decade. He has been an active contributor to the [Plone](#) web content management system, and a member of the Plone [Framework](#) and [Security](#) Teams.

[Kit La Touche](#) is a web developer, computational linguist, Linux system administrator, and game designer. He's been active in web development since 2007, and also acts as a process consultant for businesses — helping teams find the flow of communication that works best for them.

OddBird co-founder and developer emeritus, [Carl Meyer](#), is a [core developer](#) of the [Django](#) Python web framework, an elected member of the inaugural [Django technical board](#), a maintainer of the widely-used [pip](#) and [virtualenv](#) package management tools, co-author of [multiple](#) [accepted](#) PEPs (proposals for enhancements to the Python language or ecosystem), and a Fellow of the [Python Software Foundation](#).

Our Process

Our process is agile and iterative, aiming to create complete solutions quickly and in small increments.

We keep the feedback loop as tight as possible: the faster our work gets in front of your stakeholders and alpha-test users, the faster we can make adjustments and deliver exactly what's required, even as feedback along the way alters the project requirements (which, in our experience, it always does). At any point in the process, you are able to walk away and take the existing, functional code with you.

We prefer to have a client contact available for at least one or two standup meetings each week to discuss progress and any blocking questions — and available via web chat in between these meetings for questions as they arise. We encourage clients to stay closely connected with our daily progress by offering feedback and re-prioritization via [Pivotal Tracker](#), or the task-tracking alternative of your choice.

Our Work

We've worked with clients in a variety of industries - from elementary educators to professional bikers to health care providers - and have created websites and web applications for a wide range of devices.

We take design seriously, starting our process with user experience research and design, to guide and inform our solutions and development process. We love honest feedback and are constantly challenging each other and ourselves to create the clarity every website deserves.

Case Study 1 - CoachHub Branding & Web Application

Case Study 2 - Cabrini University Website Redesign

Our Proposal

Phase 1 - Consultation

Our process always begins with an in-depth consultation and discovery phase. By the end of the first phase, we will deliver the following:

User Profiles and User Stories
- An audit of the goals, usage, and behavior of each audience to focus our work around their specific needs — based on analytics, business goals, and direct conversations with users.
- Discrete task-flows, or stories, that will drive user interactions on the site. Stories are be written from the perspective of a user, and describe their goals for a given task.

Site Map
- An initial plan for information architecture components, user-flow, and navigation throughout the website.

Extensive Proposal & Estimate
- Non-functional requirements, such as browser-support and accessibility compliance.
- Language glossary and relational data structure.
- Detailed breakdown of project scope, cost, and timeline estimates.

As part of preparation for development, we will develop a language glossary to make sure everyone working on the project is thinking about the site in the same way, and that we have a shared understanding of relationships between terms. Much of the complexity in the Playworks site is around the pages for community pages. We can delineate both the terms to describe what an editor of a community has access to, the terms for the content types they are are accessing, and other details from their workflow. This glossary can also be used as part of the staff training once the website is ready to launch.

At the end of this phase, you will have a detailed breakdown of features and expected costs for development, so you can customize the priorities to accommodate your budget and timeline. Playworks is free to use the deliverables from our consultation phase with our team or any other vendor.

The flat cost for the consultation phase described above is **USD$8,000**.

Phase 2 - Design & Development

We will use an agile approach, building the website in small, weekly cycles of tightly-integrated design and development, so users can start testing the changes right away. We'll work closely with your staff to ensure that any requested changes in scope and feature-set are clearly understood by everyone involved.

Because Congruity Works has experience with the existing Playworks.org website, we will be able to skip the steps it would take to start from scratch like migrating to a new content management system or onboarding into an existing project. With our background knowledge we can progress faster—shaving off weeks of work—and produce higher quality solutions for a lower overall cost.

Rather than starting with static design mockups, we propose moving directly into development of interactive prototypes for the highest priority features, so that

we can get user feedback as early and often as possible. In the world of interactive data, it is important to keep design and code tightly integrated, so neither the data nor the design have to make assumptions about the other. We find static mockups more useful as part of the daily development flow, rather than isolated at the start of a project. Our designers will work closely with you to determine the overall aesthetics of the website as Congruity Works begins development on the initial visualizations.

Congruity Works will work with the existing Drupal code base to decide where changes are needed and where existing code and site structure can be used as part of front end development. We anticipate being able to continue using Drupal 7 without needing a major version upgrade, which will translate to significant cost savings.

We anticipate delivering multiple "websites" through Drupal's Domain Access module, allowing for multiple designs, and even domain names or subdomains, within one Drupal installation. This will create the ability to share content, teams, and administrators where applicable, while retaining centralized control over one Drupal website.

The ballpark estimated cost for the Design and Development phase is **USD$50,000**. We will provide a detailed estimate as part of the consultation phase, so you can customize your priorities based on an itemized menu of features.

Cost Estimate Summary

Feature	Cost
Consultation Phase (flat fee)	$8,000
Development & Design Phase (estimate)	$50,000
TOTAL	$58,000

Timeline

Based on our current velocity, and the rough scope outlined in the RFP, a 7-month timeline leaves room for planning, exploration, design, development, and testing of a re-architected and designed website. We'll work closely with Playworks to determine the appropriate schedule, milestones, and target release dates along the way.

Oddbird Client References

[SRAM](): [Quarq Race Intelligence]()

Dates: 2015-2016
Contact: James Meyer
Email: [jim@quarq.com]()
Title: Quarq Technical Director

Quarq Race Intelligence captures and interprets race performance and state-of-play information, and delivers that data in real time to spectators, commentators, race officials, third-party analysis software and visualization tools. Integrating with Quarq's telemetry and reporting hardware, the app shows racers' positions, direction, speed, heart-rate, and a number of other statistics in real time. Our mobile-optimized web interface has been used for bicycle races, triathlons, and non-competitive events, including regular IronMan and Enduro races.

[ORCAS](): [CoachHub]()

Dates: 2014-2016
Contact: Sara Taillon
Email: [staillon@orcasinc.com]()
Title: Director of Technology

Our mobile coaching platform for ORCAS integrates with their suite of self-management tools, as well as other vetted third-party apps — providing users with anywhere, anytime access to varying levels of support via video chat, in-app messaging, public Q&A, webinars, and support groups. Users browse

coaches, send messages, request appointments, post questions, and grant permissions for coaches to view their progress. Coaches create a profile, manage daily tasks, make appointments, post answers to questions, view user progress, and set alerts for relapse prevention and escalation of care. The product is currently being used by the US Military and Coast Guard for internal health coaching.

[Mozilla](): [MozTrap]()

Dates: 2011-2012
Contact: Cameron Dawson
Email: [cdawson@mozilla.com]()
Title: Web Developer in Tools

Mozilla's next-generation test case management system, MozTrap manages extensive test suites for all of Mozilla's software products (including Firefox, Thunderbird, Firefox OS, and others), and allows community testers from around the world to run tests on their system and report results back to Mozilla, which MozTrap aggregates into reports for product managers. MozTrap also includes a RESTful JSON API to allow automated tools to run tests and report results. The source code is available at [https://github.com/mozilla/moztrap]().

Congruity Works Client Reference

[B-word Media]()

Dates: 2015 to present
Contact: Kate Lesniak,
Email: [kate@b-word.org]()
Title: Director of Development

B-word Media approached Congruity Works to complete a complex Drupal upgrade that involved a redesign, Constituent Relationship Management (CRM) integration and migration, and a complete overhaul of their subscription management and membership program. During this process, we installed a heavily customized version of the [Springboard Fundraiser suite]() to handle one-time and recurring donations. As a quarterly print publication, they are in

the process of expanding their advocacy work. We strategize with them to develop and implement the tools to enable that transition.

Case Study: CoachHub

Responsive Web Application for **ORCAS**

What They Needed

ORCAS partnered with OddBird to build a new, mobile-responsive, web application — a hub to connect clients with health coaches for easy, anywhere, anytime access to personalized wellness guidance and support. The new software needed to work with ORCAS's existing suite of apps, especially MoodHacker, a tool for self-management of emotional well-being.

Studies show that telephonic health coaching can be effective, but ORCAS identified several barriers keeping clients from getting the right level of support when they needed it. In designing the CoachHub web app, we aimed to create an inviting space for clients and coaches to quickly and easily access one another in dynamic and effective ways.

> *We aimed to create an inviting space for clients and coaches to quickly and easily access one another.*

Planning & Discovery Phase

Collaboration & Coordination

Since we use a tightly integrated and collaborative process, we started by establishing a communication schedule with ORCAS - Monday video meetings with both teams to demo new features, Thursday video sprint-planning meetings for team leaders to review priorities and discuss upcoming features, and a dedicated Slack chat for continuous conversation throughout the week.

Since we use a tightly integrated and collaborative process, we started by establishing a communication schedule.

Vision & Strategy

For an in-depth understanding of the CoachHub project and its place in the market, we created a vision & strategy with ORCAS — getting to the core of the problems faced by our users day-to-day, how our software could most help users solve those problems, where CoachHub would fit in relation to various competitors, and what approach would make it unique.

User Profiles

We worked closely with ORCAS to create profiles of the desired users — asking who they are, how the application would fit the schedule of their day, and what they need to accomplish at different times from different devices? We identified three distinct users — individual users (clients), health coaches, and business partners who would provide CoachHub as part of their benefits package — and detailed the significantly different motivations and needs of each persona.

We identified three distinct users...with significantly different motivations and needs.

User Stories

Out of that conversation, we created user stories and tasks in Pivotal Tracker, where we could easily track progress, assign tasks, and manage priorities. Each story describes an action that one particular user would want to accomplish on CoachHub. We also used Tracker to provide detailed estimates on each story, so ORCAS could add, prioritized, and removed stories before we started, and throughout the project — remaining up-to-date and in control of the project cost and scope throughout.

Design & Development Phase

Site Architecture & Information Design

In order to get the whole team using the same language, we started by creating a glossary of terms (client, coach, chart, goal, permission, etc.) and the relationships between them. A client can have one or more coaches, every client has a chart, and can grant detailed chart-permissions to each coach. That glossary defined a shared basis for both database design and user-facing information architecture.

> *We created an interactive web of Content Template— a living draft of the site architecture.*

By mapping our glossary relationships onto the User Stories, we were able to lay out possible user-flows for any given situation. For each step in the flow we ask how did the user get here, what do they need to achieve, and where are they going next? Putting it all together, we could create an interactive web of Content Templates — a living draft of the site architecture. Interacting with the content templates helped us find patterns. We replaced the browse-coaches page, and the my-coaches page with an ever-present sidebar giving you one-click access to coaches. Some pages stood out as important starting-points for a number of flows, and those pages moved into the site navigation.
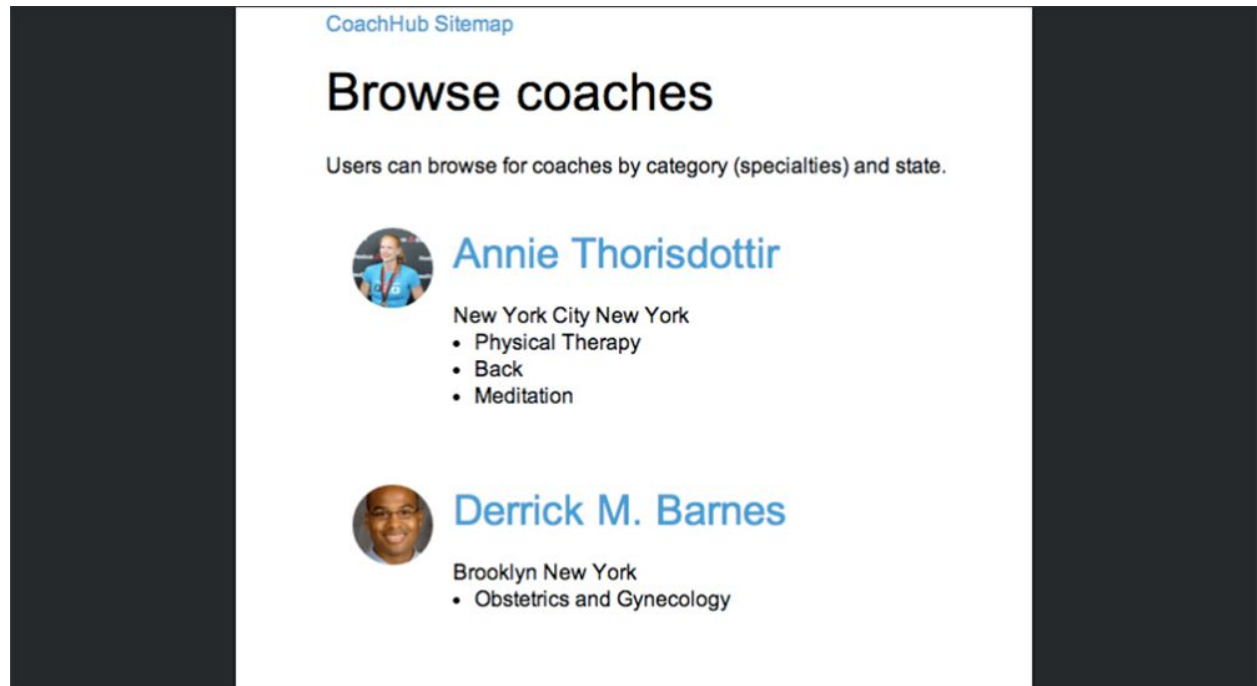
Early content template for browsing coaches, with just enough design to make it readable.

Before starting to build any features, we already had a live, interactive, and testable prototype of the information architecture and user-experience flows.

Brand Identity

After establishing with ORCAS what emotions the CoachHub brand should evoke, we worked on creating a friendly and distinct identity — building on the bright, cheerful emotions of their existing BlipHub *(pictured below)* and MoodHacker brands, tying in the new logo and overall look and feel of the app.

We started with establishing three basic brand colors and derived a full usage color palette from there. The visually compelling and extensive color palette gave us the wide range of colors we needed to create a vibrant garden throughout the app.

The leaf logo with its rounded edges and playful curl evokes feelings of friendliness and movement as well as the ideas of new life, change, and hope: turning a new leaf.
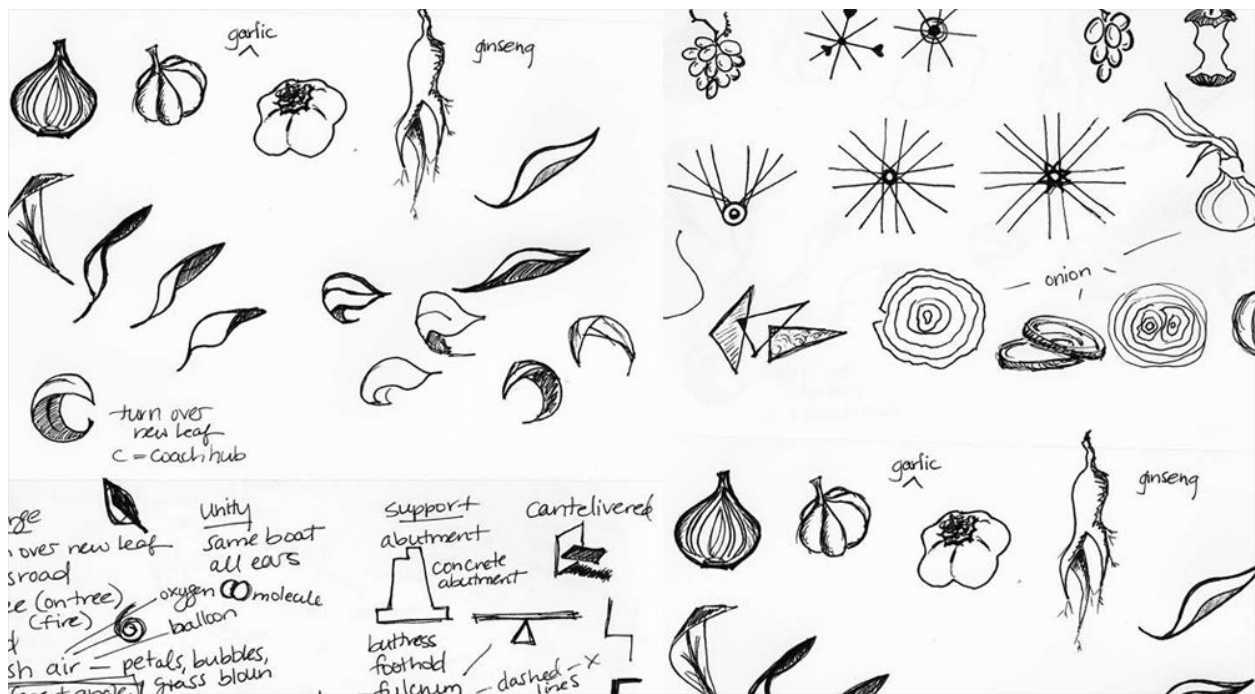
Early logo draft sketches

Designed logo drafts

Final logo

The hundreds of unique avatar designs were created from just a few unique leaf graphics dynamically rendered using light and dark contrasts of our colors and rotation of the leaves. Because each of ORCAS's partners has the option to re-brand, we designed CoachHub to easily accommodate alternate logos and color palettes.

avatars - original color palette

avatars - partner color palette

Responsive & Interactive UX Design

User experience design guides feature development. For ORCAS, we sketched rough digital mockups of features and, with approval along the way, moved on to fleshed out mockup designs and finally implementation. Using this technique we moved quickly and efficiently, minimizing the chances of wasting time and money implementing the wrong features.
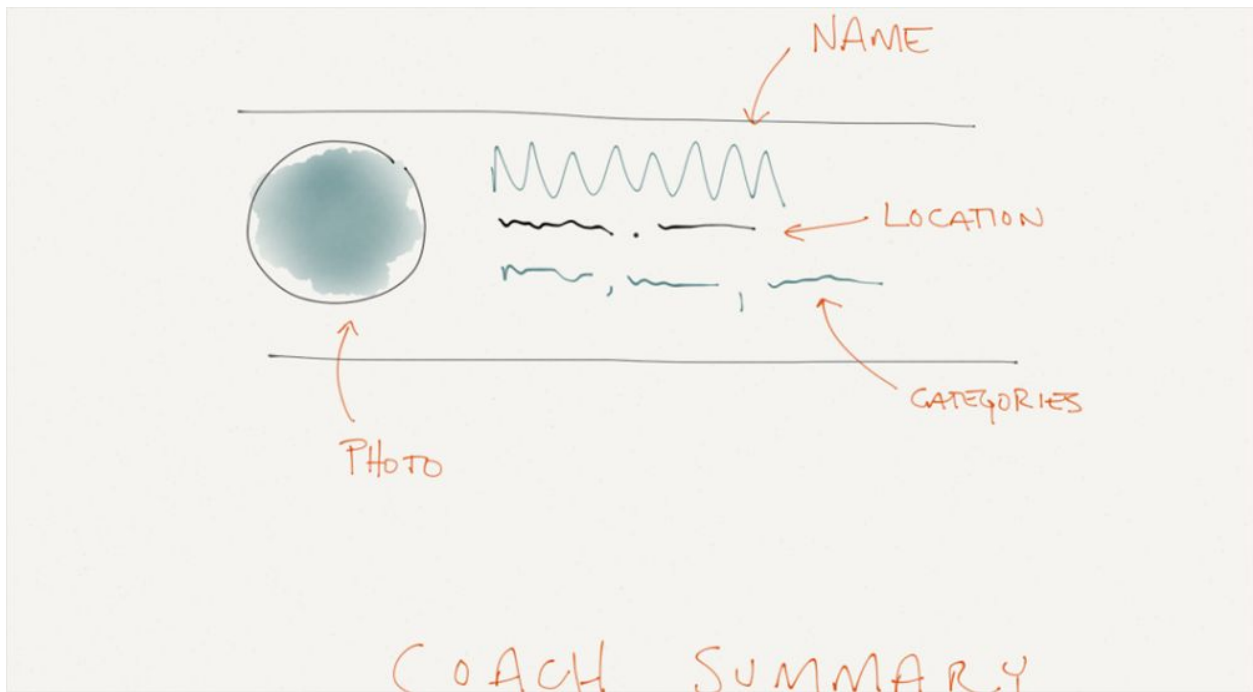
Early UX sketch for Browse Coaches
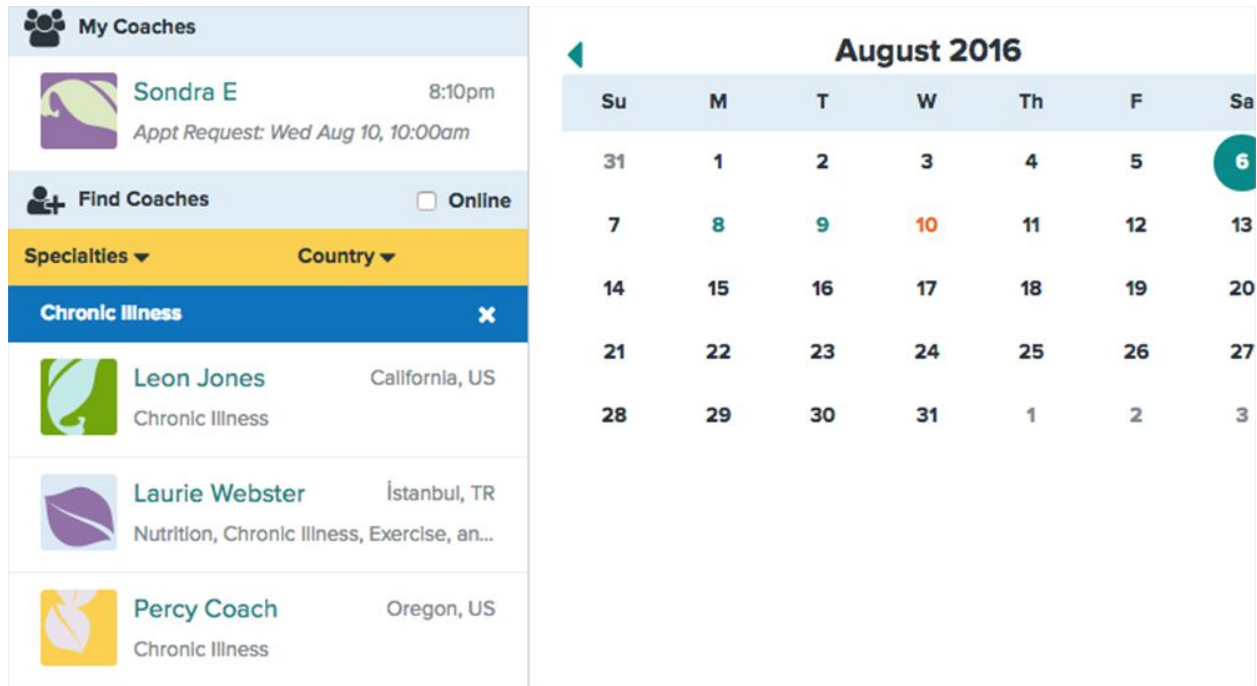
Final design for Browse Coaches

We designed wireframes and mockups for mobile devices first. Starting with designs for the smallest, most restricted screen sizes helped further clarify top priority and relevant information for each user at each stage of navigation through the content. Our earlier conversation with ORCAS about which users would be using which devices informed our decisions about what content to display and highlight on various devices.
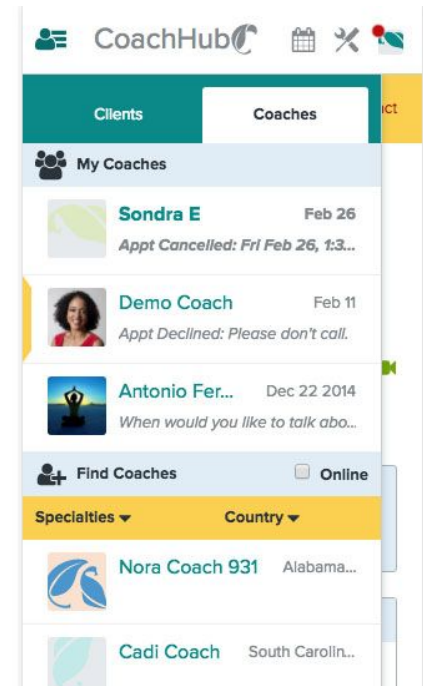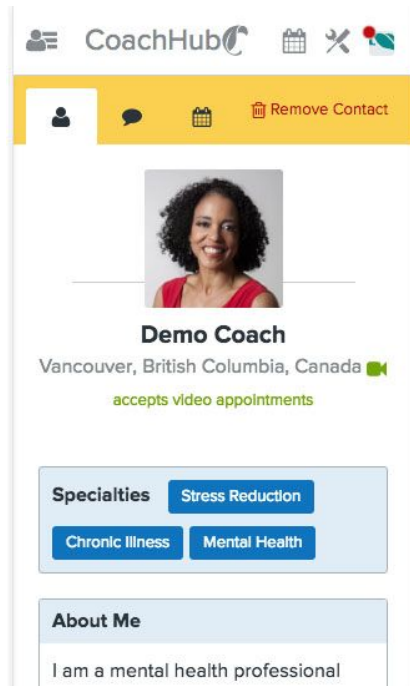
Mobile view of coach profile with side bar closed (L) and open (R)
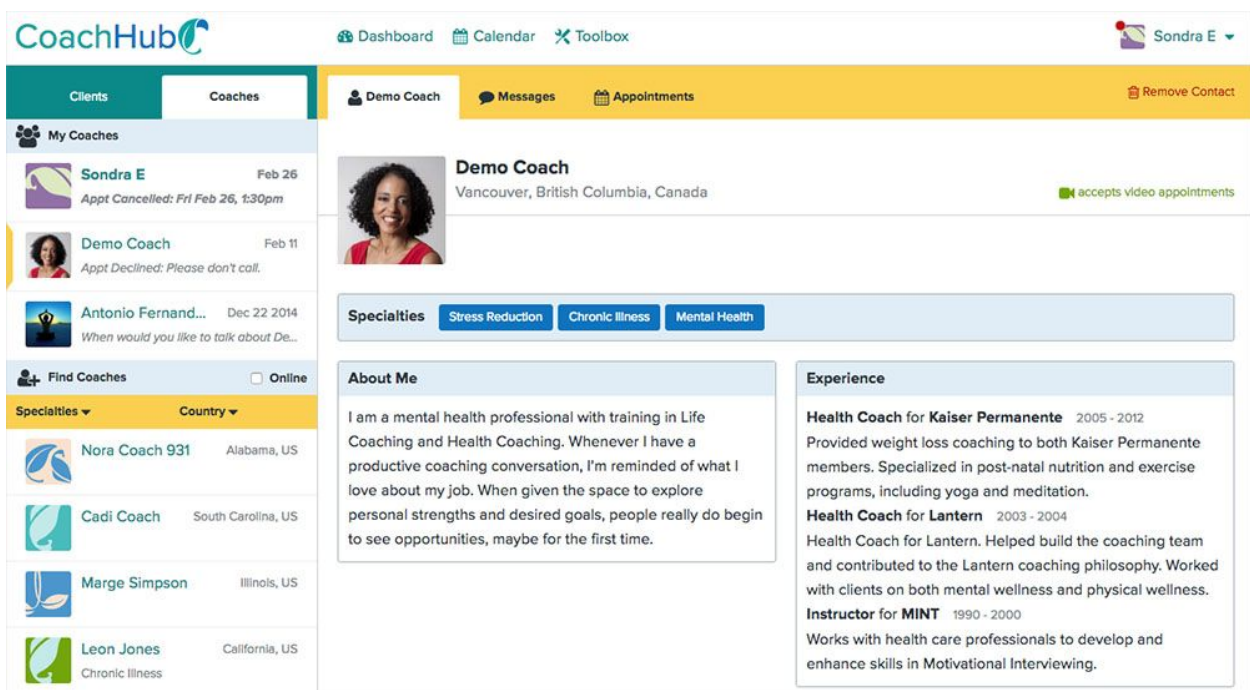
Desktop view of coach profile

CoachHub has many interactive features including the appointment calendar that allows coaches to set availability and clients to request appointments based

on that availability. There are side panels that slide in to request appointments, take wellness tests, and set preferences. CoachHub offers realtime chat and notifications that fly in at the top of the screen. Interaction can become distracting if implemented for its own sake. In CoachHub these interactive features serve the needs of the user, highlighting particular features or important information.
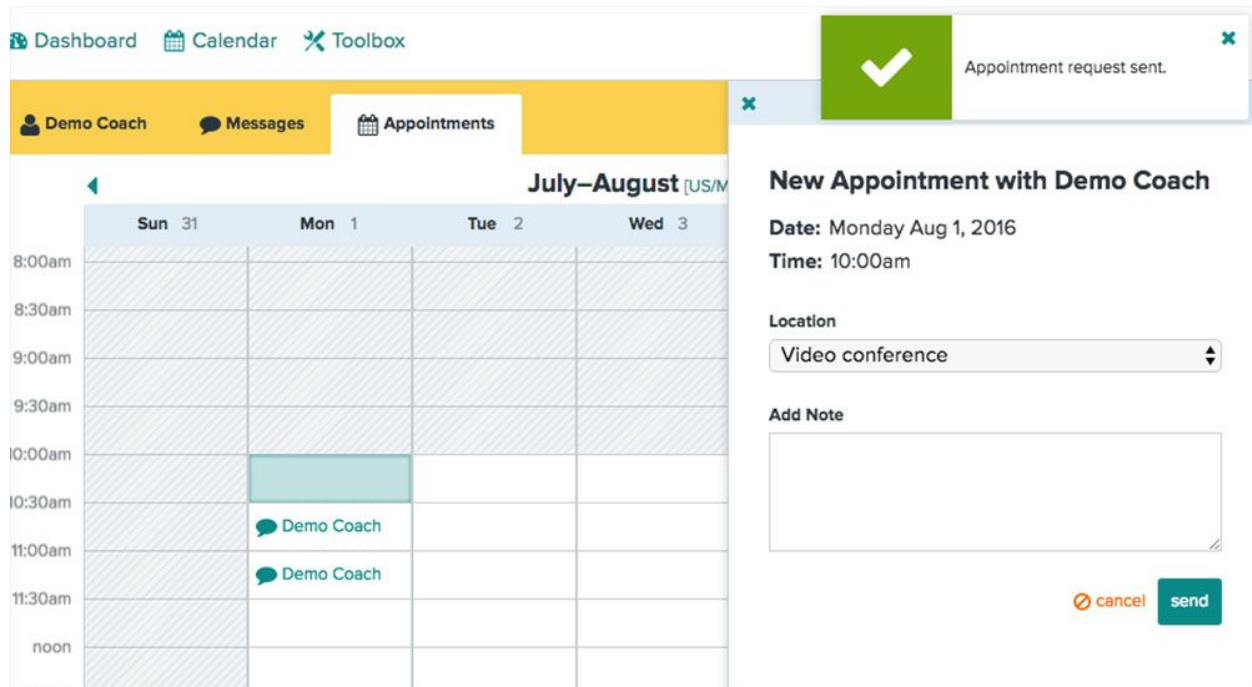
A sidebar with dynamic content slides in when a user clicks an appointment time

Landing Pages

We designed several different landing pages based on user type and status (first time logging in or long-time user) with unique calls-to-action to motivate engagement and highlight next steps. In conversation with ORCAS's internal team, we designed graphics, recommended and edited text, and identified CTAs to create a targeted and compelling marketing message.
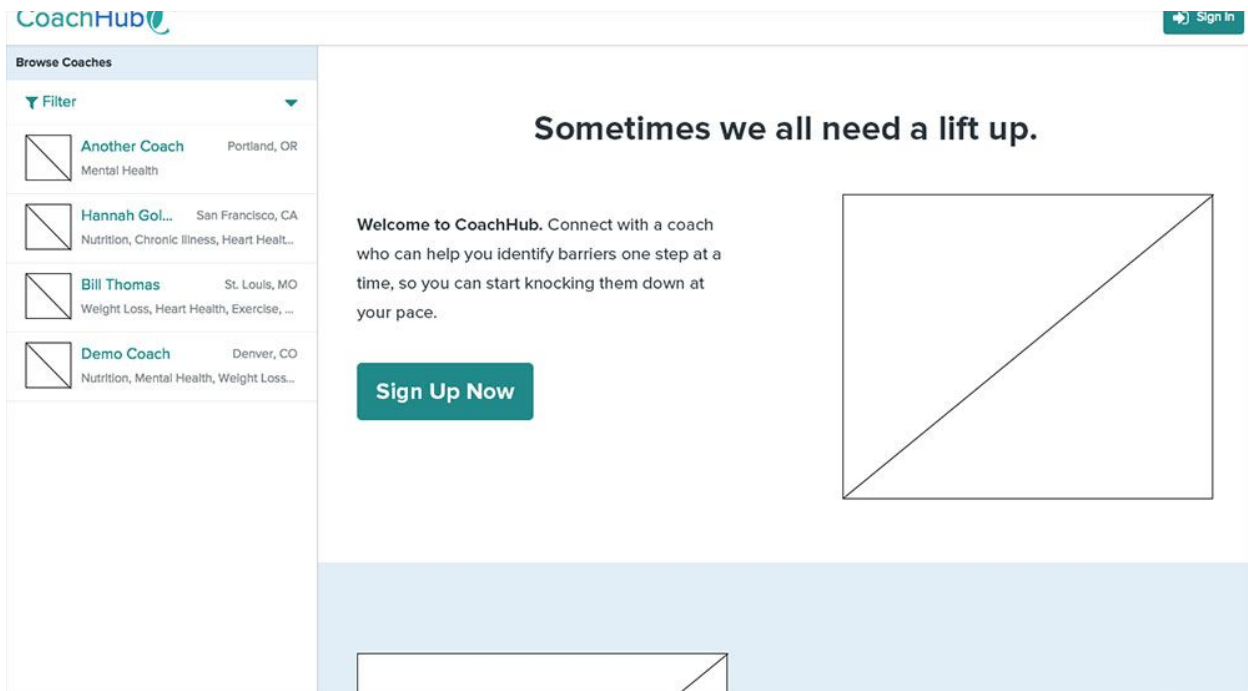
*Early wireframe of layout, design, and text*
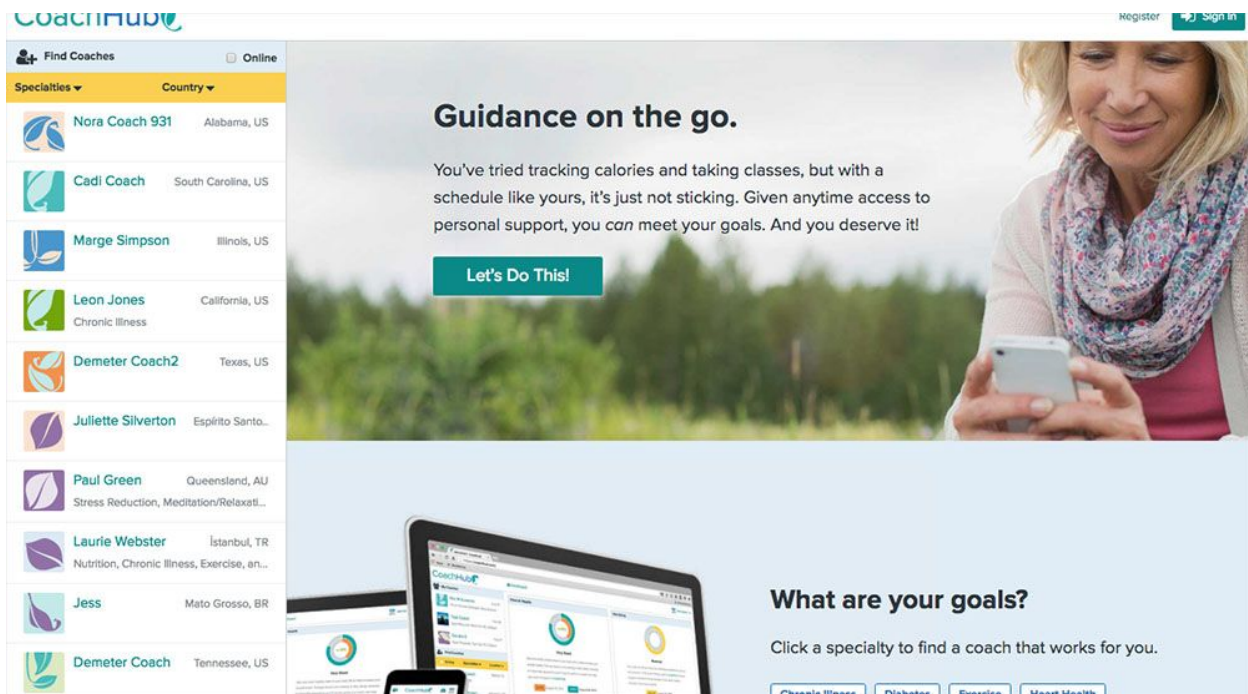
Final design and text

Usability Testing

ORCAS lead usability testing at several stages throughout the development process with one or more OddBird team members observing. This step proved vital to the UX design of complex and interactive elements such as the appointment calendar. Though the information was related, the appointment calendar had one view and set of interactions for coaches and another for clients. Usability testing also guided ORCAS in prioritizing feature development ensuring that CoachHub would be a useful and relevant product to their users and partners.
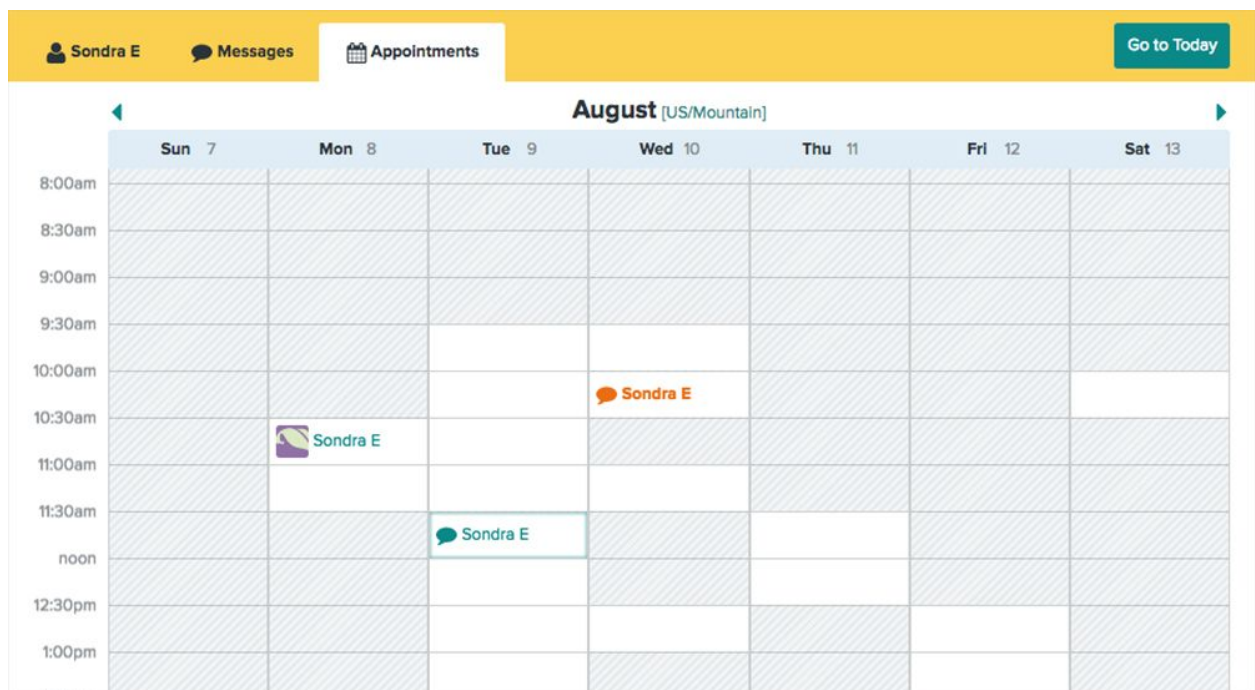
Client Calendar View
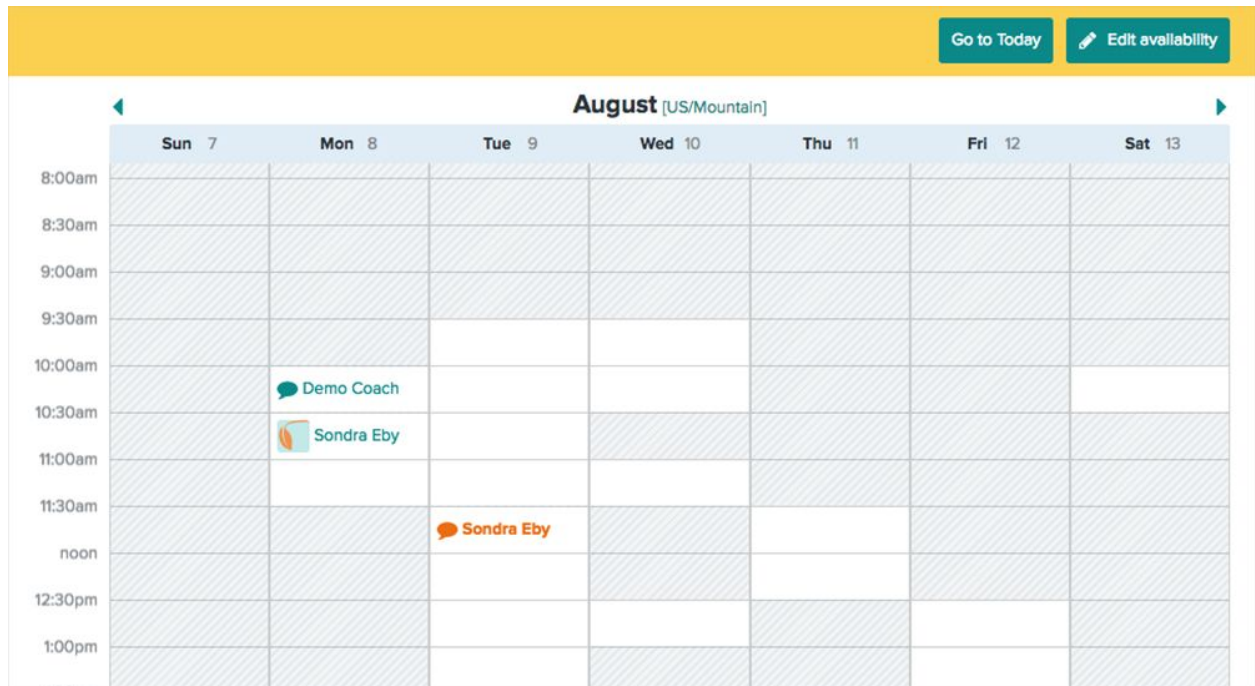
Coach Calendar View

On-Going Design

CoachHub launched with a minimum viable set of features, and room to grow. We continue to work periodically with ORCAS's internal development team, consulting on the design and flow of new features as CoachHub expands to accommodate the needs of their growing user-base — people who use it every day to improve their health and wellness, or as part of their work coaching others.

> *CoachHub launched with a minimum viable set of features and continues to expand.*

Case Study: Cabrini

Website Redesign and Replatform for Cabrini University

Before ^   After ›
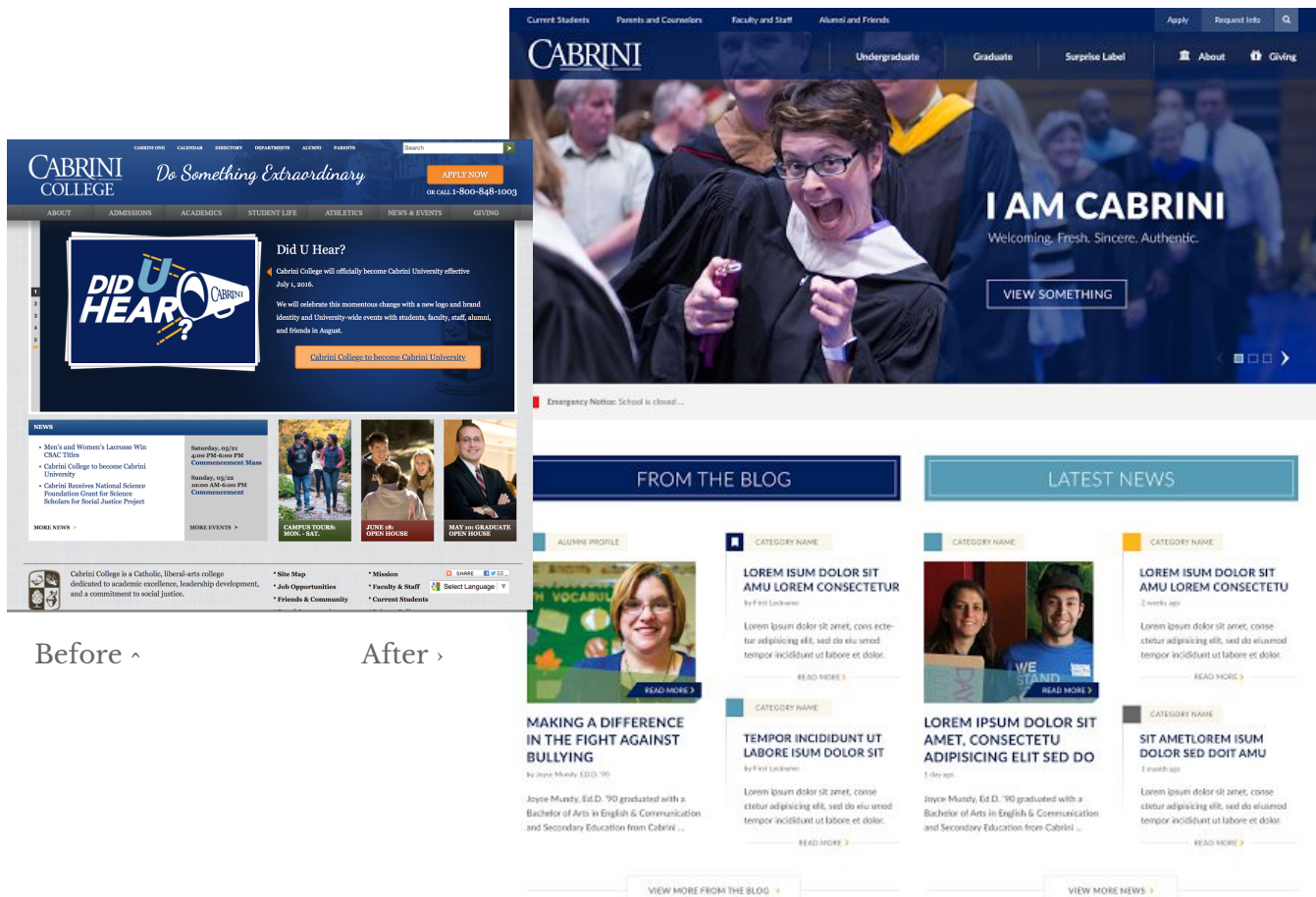
What They Needed

Cabrini was ready to make some big changes. Not only were they planning to change their status from college to university, they also were adding additional programs, setting up satellite campuses in several countries, and evolving their brand. They needed a website that would showcase all that Cabrini had to offer - attract prospective students, parents and alumni as well as speak to their existing students and faculty, all while advancing their brand and creating guidelines along the way.

Stacy Kvernmo led the UX design and front-end development while working at her former company, Collegis Education.

The Process

Quantitative Research

Before diving into the project, we conducted a thorough review of Cabrini's analytics to find out more information about their existing site. Reviewing analytics gave us quantifiable information about the visits to their site, but in order to process that data in a meaningful way, the interpretation of multiple segments was extremely important.

Screen Resolution	Acquisition			Behavior		
	Sessions ↓	% New Sessions	New Users	Bounce Rate	Pages / Session	Avg. Session Duration
	15,738 % of Total: 100.00% (15,738)	69.95% Avg for View: 69.95% (0.00%)	11,008 % of Total: 100.00% (11,008)	71.57% Avg for View: 71.57% (0.00%)	1.75 Avg for View: 1.75 (0.00%)	00:00:47 Avg for View: 00:00:47 (0.00%)
1. 360x640	2,565 (16.30%)	63.70%	1,634 (14.84%)	83.63%	1.31	00:00:29
2. 1366x768	1,921 (12.21%)	69.08%	1,327 (12.05%)	60.85%	2.17	00:01:18
3. 320x568	1,835 (11.66%)	69.32%	1,272 (11.56%)	83.71%	1.27	00:00:22
4. 375x667	1,286 (8.17%)	68.04%	875 (7.95%)	83.90%	1.29	00:00:21
5. 1280x800	765 (4.86%)	70.46%	539 (4.90%)	57.78%	2.11	00:01:07
6. 1440x900	698 (4.44%)	73.50%	513 (4.66%)	60.32%	2.26	00:01:05
7. 1920x1080	693 (4.40%)	79.48%	550 (5.00%)	53.90%	2.49	00:00:58

For instance, their desktop and laptop users were far more likely to fill out a request for information form. However, this did not mean people preferred desktops and laptops. After comparing sets of data, we saw that more people visited the site on mobile but dropped off almost instantly when visiting a page containing a long form. With this in mind, we were able to ask questions such as *what can we do to make sure the form is simple for all devices?* and *how can we use technology to our advantage*? that helped us get closer to a more effective solution.

> *We prefer asking questions instead of prescribing features as the former will always give us a better probability of discovering the right solution.*

Website performance was another metric we studied during our research phase. Performance monitoring tools framed our discussion regarding how and where we could focus on optimization. We wanted to make their site as fast as possible without sacrificing the quality and uniqueness of their brand. Collecting data

points on the speed and load times for their competitors gave us a benchmark that we used to make design decisions throughout the project.

Qualitative Research

Any piece of communication should be created with the end user in mind. What better way to find out how their users were feeling about the site and what content and features they wanted to access than to speak with them directly? The key to qualitative interviews is to ask questions that uncover how a person would behave outside of an interview session. People tend to tell you what you want to hear, so instead of asking *do you like this?* we aim to get more concrete information. We asked *When was the last time you went to a site on your mobile device to find contact information?* Removing subjectivity from our questions allowed us to understand the context in which the users accessed Cabrini's site.

In general, it is extremely difficult for people to imagine or suggest a missing feature, especially if their familiarity with the website is low. We had our interviewees also review competitors' websites to get a variety of opinions about what worked and what didn't from an emotional and functional point of view.

Content Strategy and Information Architecture

During our conversations with Cabrini, they stressed the importance of communicating to each audience directly, staying consistent with tone and vocabulary, and being concise with their message.

We structured our navigation to communicate with Cabrini's multiple audiences. We ran several treejacking and card sorting activities to see which labels made sense to each audience group. Additionally, we sought confirmation that the way we ordered the pages and grouped them into sections was intuitive to our users and stakeholders.

We learned that there was confusion, or lack of distinction, between labels such as "programs" and "majors". Without talking to prospective students, these issues may not have surfaced as the team at Cabrini had a consistent internal vocabulary that differed from the prospective student.

Each version of the sitemap was accompanied by a conversation and further testing to find areas in which we could improve.
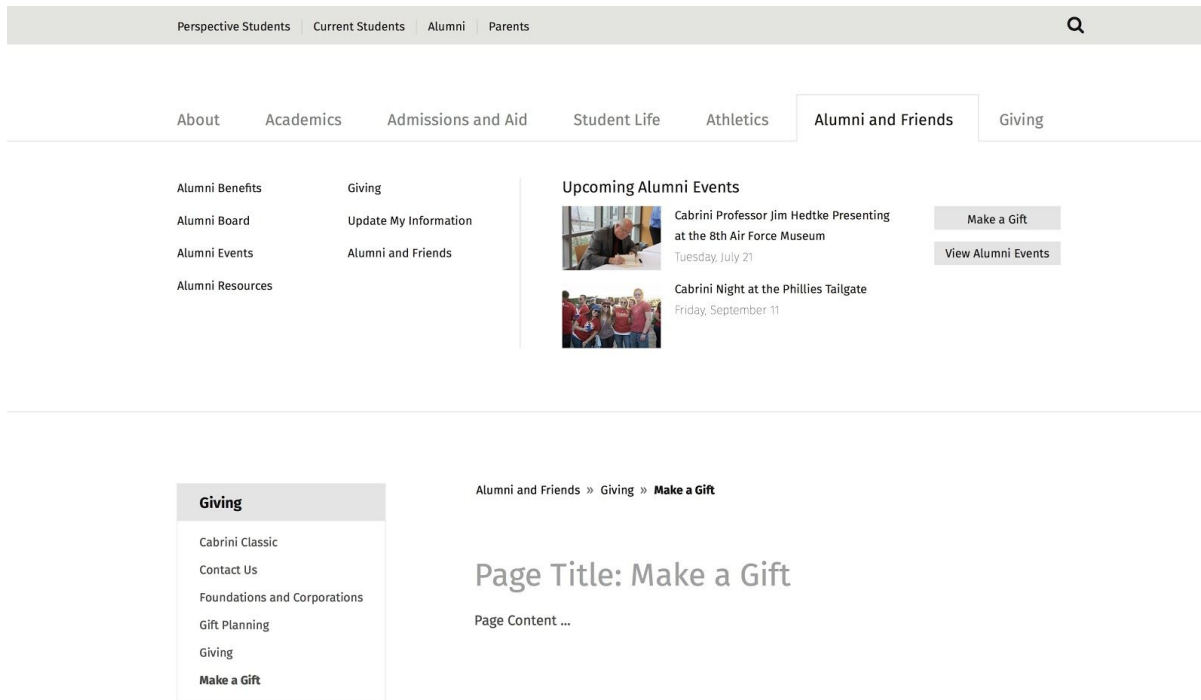
We worked together with Cabrini to go through each section and page. We didn't have the resources to re-write all of the page content, so noted which content would be migrated, re-written, updated, or deleted. To stay organized, we used a spreadsheet with columns that contained the following:

- Page Title
- Navigation Label
- Page Template (to be filled in later)
- Type of Content (lists, text-heavy, gallery, etc)
- Content Status: Needs rewrite, migrate as is, update, delete
- Featured Image
- Current Page URL
- New Page URL (if changing)

Each page was ordered within the section it belonged and nested to show child pages if applicable. This process also helped to determine how much writing would need to take place and created a list of url redirects for our development team. This spreadsheet became our single source of truth, giving our entire team a full outline of the site and a current reference of what we were building since mockups and prototypes are notorious for containing outdated information.

Wireframes

While visual design creates the look of a site and art direction develops the feel, a wireframe is used to rough in the hierarchical structure and layout of the content blocks within a page template. We created a series of quick, unstyled wireframes for each page template outlined in the sitemap spreadsheet.

Wireframes were a perfect tool for facilitating client conversations making it easier to spot issues early in the process.
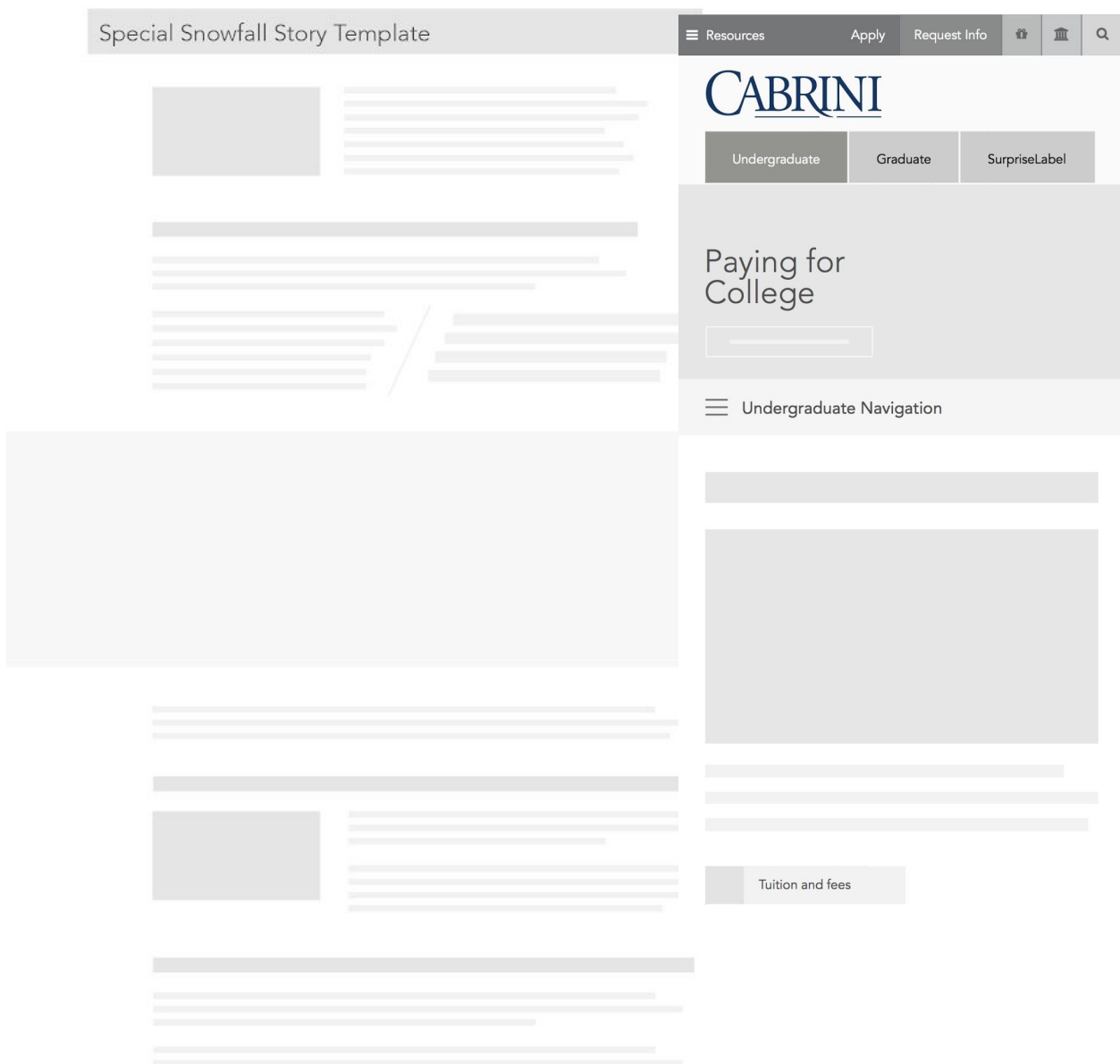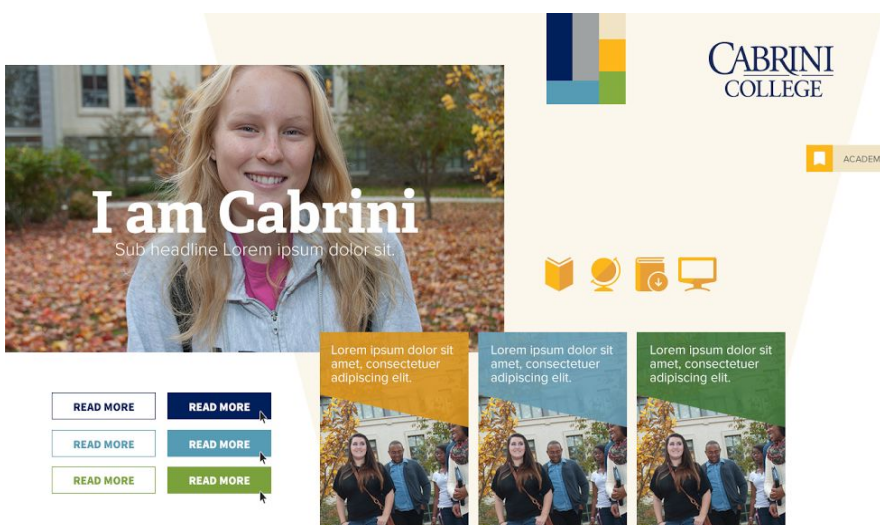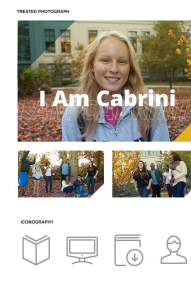
Style Tiles and Element Collages

While building the wireframes we also worked on the visual language and styles. Cabrini was going through a brand evolution at the same time, so much of the research we conducted allowed us to influence their new brand guidelines. First we created style tiles that contained only a few graphic elements - photos and photo treatments, typefaces and color palettes - to collect feedback about emotions and feelings were evoked by certain styles and how those tied into Cabrini's overall reputation.
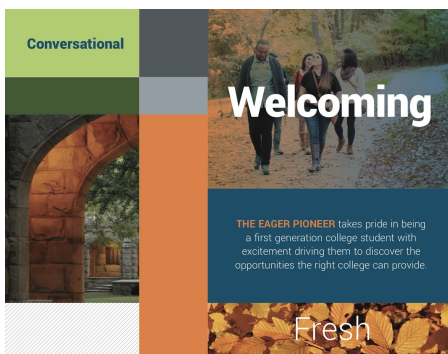
Once aligned on the best direction, we created an element collage that included resolution-independent groups of design styles to be used throughout the site. This collage grew continuously and organically as new site elements were introduced. The collage produced vocabulary of visual components shared by the whole team.

After many rounds of reviewing and refining, we ended up with a library of icons, patterns, type styles, graphic treatments, and more.

Creating the element collage was a perfect way to ensure our workflow stayed efficient.

All of our patterns displayed in one canvas meant we didn't have to create individual mockups for each page template at each popular device size.

Living Style Guide

Designing a system of reusable visual components also helped lay a foundation for the project structure during development. The element collage was easily translated into a living styleguide within the front-end code and could be accessed by the team at any time. The front-end styleguide was created within

the project itself, ensuring that all style edits were up to date without having to maintain a separate repository. It also kept our designs consistent as we avoided unnecessary duplication of an existing style.

> *Having one place to view every component was key in building a scalable website.*

This styleguide-driven design process enabled our design and development team to work concurrently throughout the project. As a result, we saved time and empowered Cabrini to create future microsites in a fraction of the time using the components from the living style guide.