

Project Proposal

ITT-2015-066: Development of two web-based training tools

10th February 2015

Ghost (Digital) Limited
Studio 5
The Old Church School
Frome
Somerset
BA11 1HR

Contact:



ghost

Intellectual Property Office (IPO)
Concept House
Cardiff Road
Newport
South Wales
NP10 8QQ

Contact:



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1. Management Summary

Objectives

Our understanding of the aims of the ITT are as follows:

- To create new page templates for the two IPO training tools IP Equip and Online IP Master Class
- To design and deliver a series of new page templates for each tool, each fulfilling the GOV.UK design principles and code standards
- To replicate IP Equip's module builder within the WordPress CMS for Online IP Master Class
- To transfer all uneditable, hard-coded content currently on Online IP Master Class into the WordPress CMS
- To optimise the design and layout of the content to assist with user absorption and engagement
- To streamline the module progression, removing unnecessary pages and including the option to skip sections
- To create a CMS-managed interactive library at the end of each module on Online IP Master Class
- To improve the usability and management of the tools for the product owners wherever possible
- To ensure all sites comply with GOV.UK standards and are fully responsive and accessible via all platforms and devices, ready for future integration into the GOV.UK website

Proposed Solution

Project management – an Agile, 'light touch' version of PRINCE-2 framework

Phase 1: Definition of requirements – Meet with the IPO in the first instance to gather requirements, interview product owners and users, and tour the existing training tools.

Phase 2: Template design, feedback and revisions – Submit mock ups to the IPO for feedback, then begin rounds of revisions and submissions until sign off is achieved.

Phase 3: Development of PHP templates, stylesheets and other functionality – Hand over the designs and any assets as they are signed off to allow development to commence at the earliest opportunity.

Phase 4: Ghost testing – We would go through the tools front-end as an end user and the CMS back end as a product owner, testing design, functionality and usability across all supported browsers and devices.

Phase 5: IPO testing, feedback and revisions – We will hand over to the IPO for their two week testing phase and await the results of the their testing. Any revisions will be carried out at once and a new release issued back for further testing, prior to go-live.

Benefits

By using Ghost and the solution outlined in this proposal, it will be possible to deliver all the required work – both design and development – within the short time frame and under the budget. Our Agile experience and small team size means that we have the ability to react quickly to feedback and change requests without compromising the quality of the work, and we have

plenty of experience delivering complex projects at short notice. A significant part of our proposed solution involves making good use of the existing training tool content and design, plus the user feedback the IPO has already collated, as this means that we can move quickly into an intensive development period and feel confident about delivering all the requirements to the high standard expected.

Why use Ghost?

You will find Ghost to be a proactive, flexible and open agency. We will listen to your needs and requirements and will not be prescriptive in our response. A small company with over 30 years combined web development experience, our approach is truly agile and our aim is always to do what is best for the client, the project and the end user.

Established in 2006 (as Espace Solutions LLP) and rebranding as Ghost (Digital) Limited in 2012, we have developed over 100 WordPress-based sites for our clients, who range from local start up businesses to large international organisations. Our approach and work ethic was developed from our own experiences of working with outside agencies, in our previous jobs developing websites and online training tools for two large bookseller chains. We understand that communication and collaboration are the cornerstones of a good working relationship and our creative thinking and open, flexible way of working has meant that our customers have returned to us again and again.

As a team, we have extensive experience delivering all the project requirements mentioned in this ITT. We have converted un-editable, HTML websites to fully editable WordPress sites and we have redesigned and redeveloped many company websites from fixed design to fully responsive. Perhaps most usefully, we have held many WordPress management training sessions over the years, so we have a very clear idea of what makes an intuitive, easy-to-manage website. We are also aware that this work is being undertaken to facilitate future integration with the GOV.UK website, and we would bear this in mind at all stages of development.

When it comes to creating WordPress websites for in-house management, Ghost has an excellent track record and we are confident that we would deliver an excellent end product on time and under budget.

Project Costs

Template design and development & associated project management	£22,400 + VAT
4 weeks support @ [REDACTED] hours per week	£2,240 + VAT

Warranty

In the unlikely event that any bugs or functionality errors are discovered post-launch that have occurred as a result of code we have written, we will fix them free of charge for up to 90 days. Our warranty covers code and graphics developed by Ghost (Digital) Limited. The warranty is good for 90 days from production (the day your site is given to you or goes live) and covers errors or omissions made by our staff during the development period. Any code altered by the customer and/or 3rd party applications, used in your website, is outside the scope of our warranty. The accuracy of the content provided to complete the website is the customer's responsibility, and alterations are considered post-completion change requests and as such, billed as extra.

Contacts

[REDACTED]
Technical Director & Founder
[REDACTED]

[REDACTED]
Creative Director & Founder
[REDACTED]

Ghost (Digital) Limited
Studio 5
The Old Church School
Frome
Somerset BA11 1HR
[REDACTED]

2. Understanding of Requirements

The three key requirements of this project will be:

- To design and deliver a series of new page templates for IP Equip and Online IP Master Class
- To rebuild the hard-coded Online IP Master Class and turn it into a fully editable CMS-based tool
- To transfer all hard-coded content from Online IP Master Class into the WordPress CMS

Other objectives considered within this proposal are:

- To optimise the design and layout of the module content to increase user engagement and add more interactive elements
- To improve the content management options for the product owners wherever possible by bringing Online IP Master Class in line with IP Equip
- To remove unnecessary steps in module progression
- To create a CMS-managed interactive library at the end of each module on Online IP Master Class
- To prepare both tools for future integration into the GOV.UK website

Services we intend to provide to meet the requirements and achieve these objectives:

- Project management (an Agile, 'light-touch' version of PRINCE-2)
- Web design
- Web development
- Functional testing
- Usability consultation

Questions submitted to the IPO

1. Are the two weeks testing to be included in the 4 week work process or can the testing commence after delivery at the end of March?

Answer - We expect the release to us to have been fully tested as detailed in the ITT. However, our own testing can continue beyond that time frame

2. Would it be possible to see the current back end of IP Equip and Masterclass - either via log in, webex or screenshots?

Answer - We've attached some screen shots of the back end of IP Equip and the IP Master Class.

3. Will the Masterclass module composition functionality replicate the current IP Equip functionality? We are assuming that as the content is currently hard-coded, there is no module builder in place at present.

Answer - You've assumed correct, the content is hard coded and there is no module builder for the Master Class.

4. There is a reference in the tender to editing the page templates (Annex C: 12.1, item 5 in table) - does this refer to an ability to edit the page layouts or the page text?

Answer - The product owner needs to be able to select a template and then edit the text in that template for that page.

5. Who are the product owners? Are they third parties (i.e. external) who will require secure logins and limited access to edit a specific area/s of the site? Or will they be internal, or not need restricted access?

Answer - The Product Owners are internal, specifically our Business Outreach Product Owner. She will require full editable access. Access will also need to be provided to our IT department and possibly colleagues within our Business Outreach Directorate.

6. What constitutes a module? Is it a composition of pre-existing elements or would it need to include options for type? e.g. a quiz module with quiz-builder function

Answer - We only require page templates. If we want to create a new module we can create this based on the new templates we're given, rather than the supplier designing whole modules.

7. Given that IP Equip is currently on a .gov.uk themed WordPress platform, are there any specific issues that you are hoping the redesign/rebuild will resolve?

Answer - There is a common page (the disputes page) that runs through each module which asks the same questions throughout each module. Ideally we'd like to remove this page as it doesn't add any value.

8. Annex C mentions users must be able to access an 'interactive library' to allow them to go back to information at a later date. Is that a list of modules and the steps within each module, or a library of documents or reference links?

Answer - It's a library with documents and reference links. If they complete one module in IP Equip they can access the library themselves to view.

9. Does the Online IP Master Class need just the module content to be editable or is there also a requirement for the structure, page elements and quizzes to be editable?

Answer - We'd need everything to be editable by our Business Outreach Product Owner, including the quiz style questions. We can provide you with log-in for the Online Master Class if that will help you.

3. Requirements

This section will contain our responses to the requests for information under sections 4 and 5 of the ITT.

4.1 Organisation & Resources

Ghost (Digital) Limited is a small digital agency providing web design and development, film, digital strategy and project management. Based in Frome, Somerset, we produce stylish, professional media and digital applications for our clients, while providing a friendly, personal service.

We have a lot of experience turning company websites into CMS-based solutions, transferring content and features whilst keeping the look, feel and layout of their existing web offering. We have successfully carried out this work for organisations such as [REDACTED] and [REDACTED], recreating the existing sites where desired and improving the functionality where necessary.

We are specialists in WordPress development, with over 100 WordPress websites in our portfolio ranging from local speciality retailers to large international organisations. We have also successfully cultivated long-standing relationships with our clients due to our Agile approach to development projects and outstanding customer service.

Labour

The below table identifies the Ghost personnel that would be involved in the project.

Name	Role in Project	Responsibilities	Skill Set
[REDACTED]	Technical Director	Technical overview Testing	Agile development Time management People management Quality management
	Front End Developer	Development	CSS PHP HTML
[REDACTED]	Project Manager	Liaise with project owners Feedback into project Deliver on time within budget Ensure compliance with required standards Testing	Time management People management Cost management Quality management Agile management Compliance
	Web Designer	Production of mock ups Production of design assets	Design Photoshop CS Fireworks Graphic design

	Lead Developer	Development Production of code Testing	Website development System architecture Server management Agile development PHP HTML Javascript CSS
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Equipment

Below is a list of the hardware resources available that may be used throughout the project.

Resource	Amount	Details
Computers	3	Apple Mac and PC
Testing Suite	8	Various physical platforms and screen sizes for testing iPhone 4 iPhone 6 Blackberry Kindle Fire iPad iPad mini LG Nexus 5 HTC Nexus 9
Servers	4	VPS, LAMP, CPanel, 1 dual core, 3 single core

Materials/Resources

Below is a list of the online resources and tools that would be utilised throughout the project.

Resource	Use	Details
Basecamp	Online project management software	To do lists Assigned tasks File library Reference documents Project calendar
Browserstack	Online testing software	Allows simulation of various Operating systems and hardware set ups
Git Source Control	Versioning and deployment	Allows audit and tracking of versions during development
Adobe Creative Suite	Design, testing and coding	Includes: Fireworks, Photoshop, Edge Animate, Illustrator
Screenfly	Testing in various screen sizes and resolutions	Simulates how a site would look with various screen resolutions and sizes

Schedule of Resource Use

The below table details planned resource use for the duration of the project, from commencement to go-live.

Assumptions:

- That project delivery dates will not change during this project
- That external testing is available from week commencing 23rd March

- That project scope and requirements will not change during the project, excepting feedback from the Agile process
- That any significant changes to the requirements will be made with the understanding that there may be some impact on the schedule.

Labour Resource	w/c 23 rd Feb	w/c 2 nd March	w/c 9 th March	w/c 16 th March	w/c 23 rd March
Project Manager					
Web Designer					
Technical Director					
Lead Developer					
Front End Developer					
Internal Testing					
IPO Testing					

Team Profiles

Although Ghost have extensive experience of using carefully selected freelancers and subcontractors and all members of the team are experienced people managers, Ghost will not be utilising any subcontractors for this project.

[REDACTED]

Title: Creative Director

Project role: Project manager

[REDACTED]

[REDACTED] is the creative director of Ghost and has responsibility for the interface between design and technology, as such he is often the main point of contact for Ghost's clients. For this project [REDACTED] will be the Project manager as well as leading the design process. In his role as designer he will produce mock-ups and then graphic assets from signed off designs. As Project manager he will ensure the work is completed on time and to budget. He will be the main contact for the IPO, delivering reports on progress, feeding back to the Ghost team and acting as an open channel of communication. Relevant skills to this project include people management, cost management, quality control and time management. For this project Ghost will employ a light touch, Agile management framework, [REDACTED] has extensive experience of working in this way. [REDACTED] has worked on projects for [REDACTED] as well as many others. A full CV can be found in Appendix A of this document

[REDACTED]

Title: Technical Director

Project role: Technical overview & Development

[REDACTED]

[REDACTED] is the Technical Director and Business Manager for Ghost, having responsibility for the financial running of the company as well as driving business development and strategy. For this project [REDACTED] will run the technical overview, ensuring that the technical solution works for all the stakeholders in the project, from end user to IPO web managers. [REDACTED] will be directly involved in the coding of the site and will work closely with the Lead developer on the project. [REDACTED] will be drawing from her years of experience commissioning, developing and managing various websites, specialising in WordPress, to ensure the finished work is of a high standard from the code up to the front end. The light touch, Agile development framework that Ghost will be using throughout this project is particularly suited to [REDACTED]'s skill-set, as the flexibility allows her to be involved in all aspects of this project and act as the second point of contact after the project manager. [REDACTED] has worked on projects for [REDACTED] among others. A full CV can be found in Appendix B of this document.

[REDACTED]

Title: Head of Development

Project role: Lead developer

[REDACTED]

██████████ is the main developer at Ghost; he leads on back end development, as well as running Ghost's servers and hosting. In this project ██████████ will be Lead developer, producing code and ensuring compatibility with existing systems architecture. He will also react quickly to any alterations that come out of the Agile process and the testing stage. Working with the Technical Director to ensure the code and end products remain true to the end goal as the project progresses. He has years of experience working on all manner of sites and applications for an incredible range of companies and organisations, including ██████████ ██████████ ██████████. For Ghost he has worked on ██████████ ██████████ and many others. Although he specialises in WordPress he has experience of a range of applications, software and languages. A full CV can be found in Appendix C of this document.

Subcontractors

Although Ghost have extensive experience of using carefully selected freelancers and subcontractors and all members of the team are experienced people managers, Ghost will not be utilising any subcontractors for this project.

CVs

Please see Appendices A-C for all team CVs

4.2 References for Similar Products

In this section, we have detailed two projects that we believe demonstrate our relevant experience and our ability to deliver the requirements and objectives detailed in this proposal.

Contact: [REDACTED], Director, [REDACTED]

Date: Feb 2013 - Sep 2013 (phase 1) plus ongoing development and support to present day

Contract sum: [REDACTED] (initial phase)

End product sponsor: [REDACTED] (now part of The Department of Business, Innovation and Skills)

Project summary: Development of a customisable widget system that would allow agencies and stakeholders to display on their websites the Apprenticeships available from their institution or area. The existing system was chronically underused because advanced technical skills were required to utilise the database that were out of the reach of stakeholders.

Details: The project was run in an agile manner, where we helped to define the requirements and project goals. We first created a WordPress site at <http://avfeedbeta.org.uk> and key stakeholders were informally asked to fill in a questionnaire on the site. Working with [REDACTED], Ghost then collated the responses, followed up with participants and formulated a series of project goals. The goals were used to define a quality benchmark and formulate a project plan.

We then developed a widget generator and interface that allowed stakeholders, such as colleges offering apprenticeships, to easily generate code which they could host on their own sites. The widget generator allows an unprecedented level of customisation for the wealth of vacancy information stored on the database. The result was a huge take-up of the widget amongst stakeholders, an increased awareness of the Apprenticeship programme and ultimately more young people were able to find apprenticeships. Further development by Ghost saw apprenticeship vacancies being plotted on maps for a more visual experience, and customisation of the regional settings, which allowed more stakeholders (such as local authorities and online local news outlets) to publish available apprenticeships.

Ghost's methodology and way of working proved to be efficient and conscientious. [REDACTED] of [REDACTED] said of the project:

"The results were very successful in increasing the reach and accessibility of the API data and the project is now being shown as an example of best practice within the government agency. Ghost come highly recommended."

Ghost continue to offer support and maintenance to what has been a very good value for money solution for the [REDACTED] (now part of The Department of Business, Innovation and Skills).

Relevance:

Working with Sponsor to define project goals
Agile development
Fast, flexible working
Controlled project management of fast developing brief ensuring budget not exceeded

Contact: [REDACTED], Communications Advisor, [REDACTED]
[REDACTED]

Date: Nov 2012 - Feb 2013 plus ongoing development to 2014

Contract sum: Not able to disclose due to terms of contract

End product sponsor: [REDACTED]

Project Summary: The [REDACTED] oversaw a project called [REDACTED] which is a UN group allowing developing countries access to academic papers and publications that in the West would cost a premium. The project, a collaboration between several UN agencies, had a website supplied to it as a flat HTML site without a content management system. They needed to be able to update it themselves and expand several sections in line with their developing remit, while still keeping the mutually agreed basic design.

Details: The project was managed remotely without visiting the [REDACTED] overseas premises in order to keep the costs low. Regular updates were provided in order to keep project sponsors informed and react to feedback. Ghost made changes to the original design while preserving the initial signed off branding in order to prepare the site for becoming CMS driven. Without taking down the original website, we set up a fresh WordPress install on a development server that later became the server for the site itself. Based on the signed-off designs, the Ghost development team created templates for the different pages and these were then built into a new WordPress theme for the website. Finally, the content from the existing site was transferred over. We also replicated and hosted a Windows server to manage the [REDACTED] registration module which integrated into a proprietary back-end running on a server within their organisation.

There then followed a period of testing, as a result of which the templates were refined.

Further development work was undertaken by Ghost some months after the launch to accommodate a different way of presenting news and we continue to host the website, and registration page.

The outcome for [REDACTED] is an expandable platform that has proved up to the task of growing with their remit.

Relevance:

Conversion to WordPress
Working remotely but effectively
Working within established design and presentation restrictions

Other relevant projects

[REDACTED]
Revamp of the grant awarding foundation's website from a static site into a versatile WordPress installation. This has allowed for a vibrant social media and news led presentation without compromising the authority of the foundation, or burying the case studies and success stories.

Relevance:

Converting from HTML site to WordPress
Redesign to facilitate project goals

[REDACTED]
Restricted URL

Using WordPress, Ghost built an online application that acts as an interface with a huge database, allowing [REDACTED] staff to quickly and effectively identify relevant resources for homeless and vulnerable people within their local authority in London. The solution is ultimately scalable and when budget allows will be rolled out across the UK.

Relevance:

Built in WordPress multisite

Scalable

End user project goals very specific and were constantly referred back to during complex design and build

4.3 Methodology

In this section, we will outline our development approach, our methodology and the anticipated tasks and project milestones.

Development Approach & Methodology Used

Given the set time scale, budget size of this project Ghost propose to use a traditional project management methodology of Planning, Execution, Control and Closure based upon a Light-touch version of the PRINCE-2 project management framework.

We propose a single Ghost Project Manager who would organise, plan and control the work of the project. The prime responsibility is to ensure the project produces the required outcome in accordance with the time, cost, quality, scope, risk and benefit goals. The Project Manager would deal with any risks, issues and changes and report progress to the sponsor.

The IPO would provide a 'sponsor' who represents the interests of the IPO and is accountable for the success of the project. The sponsor would have the authority to make decisions on behalf of the IPO and would liaise with the Ghost Project Manager regularly and to check on the project status, milestones and targets.

Planning

A business case exists to explain why the project is needed and what the benefits are. This would be tracked to make sure the project fulfils the sponsors goals. Annex C and Annex D of the ITT contain the Must haves and Would like to haves for the project and along with the business case can be used to monitor goals and quality in relation to the work. It is assumed that an initial planning, definition and requirement gathering meeting would take place at the IPO's premises, where Ghost could be given a 'tour' of the training tools in use (front and back end) and speak to key stakeholders about their use of the websites and their requirements. The results of that meeting would be a definitive statement of goals for the work, and a description of the quality standards to be used as well as an agreed process to make sure the work is fit for purpose.

The Resource plan submitted with this document would be revised after the initial meeting, and a Project plan formulated, a schedule with project milestones would be agreed and circulated.

Ghost would make use of Basecamp software, and would create log ins for relevant IPO staff to have access to the repository of project material, which would include:

- Project goals/business case
- Project plan
- Project schedule with milestones
- Risk register
- Change register
- Progress reports/Summaries
- To-do lists
- Agreed issues
- Testing/Bug list

This material would be updated as the work goes on.

Log ins for GitHub (versioning software) can also be provided should this be required.

The IPO would have open access to Basecamp allowing continuous instant access to project status and progress, and can enter into discussions and comment threads to ask and answer questions. A schedule of reporting and the relevant form those communications would take would be agreed, and the necessary resource has been factored in. Any face-to-face meetings would be arranged and booked in as project milestones.

Execution/Control/Testing

Basecamp would be used to define the individual tasks that make up the work. These would appear as an ordered list. Each task can have its own comment thread where questions can be asked or notes recorded.

The Technical Director with the Project Manager would ensure that the solutions remain true to the project goals, via a process of review for each distinct task. As each task is completed, it is ticked off on the list.

During the Execution phase the Project Manager would update the IPO via a Highlight report so that progress can be reviewed, any feedback can be incorporated into the work and, if appropriate the risk register updated and the project plan revised. As each task is completed, the test server would be updated via GitHub (or Git) in order to create a distinct audit trail for the code.

Testing by Ghost will be carried out to ensure that the code is of sufficient quality and complies with the agreed standards for the project.

The testing approach is described in section 5.11 of this document. From a project management and methodology point of view, Ghost would expect the feedback from testing to be made into a to do list on Basecamp. Each item on the list can then be commented on, discussed, and screenshots added if necessary, then each to do would be moved to an Agreed Issues list and tackled by the developers in the same manner as the Execution stage to be submitted for re-testing until the issue is agreed to be resolved.

Closure

After the testing and re-testing process is complete and the work is considered to be ready for launch, Ghost would meet with the IPO for a handover meeting. This meeting would take place at the end of the project but prior to the 90 days warranty period. At this meeting, Ghost and the IPO would formalise completion and ensure smooth handover as well as agreeing the process for dealing with any issues that arise during both the 90 day warranty period and the 4 week additional support time requested in the ITT.

It would also be advantageous at this stage for Ghost and the IPO to review the project process and share any opportunities for learning, as suggested by the PRINCE-2 project management framework.

Project Milestones

Milestone	Outcome
Requirement gathering	Project goals and standards agreed
Design complete	Any design work is completed, feedback accommodated and designs are signed off
Execution complete	Designs are applied, code work is completed ready for internal testing
Internal testing	The work is tested by Ghost and any issues identified
Testing feedback and refinements	Any issues from Ghost testing are fixed, ready for handover
External testing/feedback	The work is handed to the IPO for testing and feedback is compiled
Resolving issues	Any issues identified in the IPO/external testing are resolved
Handover	The work is formally handed to the IPO for deployment

5.1 Requirement

The phases of our development approach is as follows:

Phase 1: Definition of requirements
Phase 2: Template design, feedback and revisions
Phase 3: Development of PHP templates, stylesheets and other functionality
Phase 4: Ghost testing
Phase 5: IPO testing, feedback and revisions

Template Design & Provision

Where new templates are required, we will look at the existing design and consider its effectiveness, both in terms of content presentation, usability and browser/device responsiveness. In those instances where an existing page design is deemed successful, or where the layout options are restricted, it may be preferable to simply re-code the existing design but where new page designs are appropriate, we would begin a process of wireframing, mock ups, feedback and revisions.

For Online IP Master Class, all templates will need to be recoded as they will no longer contain any static text. Instead all text, image and interactive areas of each page template will be controlled via a corresponding editable field within the CMS (WordPress) page settings. Repeater fields will be used where appropriate e.g. where content is laid out in a table. The number of rows would be dynamic allowing the product owner to add/remove the number of rows. The templates will define the layout of the content, but the content itself will be editable in the CMS.

During the design process for IP Equip and Online IP Master Class, we would be looking to find out how we can best enhance the existing design offering. We would use the existing page designs and GOV.UK design guidelines to create new design treatments, working to client feedback to refine each template until we reach a signed off design. Once these mock ups are signed off, web assets are created and passed to the development team, who will turn the design into either individual WordPress page templates or a complete WordPress theme.

Template Development & Content Transfer

For IP Equip, we would first consider the required layout of the existing templates and content, and plan out the relevant template sections for the most efficient switch from current to new. If we feel that some improvements can be made to the system, we will feed back to the IPO for guidance, as the decisions made for IP Equip will also impact on Online IP Master Class.

Once the IP Equip work has been done, we would then have a clear layout and functional specification for the Online IP Master Class templates, which at present has no means of compiling a module for the product owner. It makes sense to replicate the functionality of IP Equip wherever possible to allow for continuity of use for both users and product owners, making service management and future user training easier and more efficient.

Based on the user stories laid out in Annexes C and D, we have made the following assumptions regarding required development work:

IP Equip:

- Creation of new, fully responsive page templates (number yet to be defined), a mix of interactive media pages and text-only that fulfil the GOV.UK design principles
- Include a visual progress bar, allowing users to see where they are in the module
- Add the ability to create new modules to add to the existing ones in the WordPress CMS
- Ensure a good non-javascript solution
- Add the ability for users to skip a module
- Removal of unnecessary landing page before beginning the module
- Removal of timers on module pages

Online IP Master Class

- Creation of a selection of new, fully responsive page templates, a mix of interactive media pages and text-only that fulfil the GOV.UK design principles.
- Replicate the module builder functionality found on IP Equip to work with the new page templates
- Ensure a good non-javascript solution
- Ability for users to skip a module
- Interactive library at the end of each module (we have made an assumption that this already exists for IP Equip)
- Removal of timers on module pages

The existing content on Online IP Master Class will be transferred from hard-coded static templates into editable versions of the

same template by the Ghost Development team. The safest way in which to do this will be to copy and paste from either the front-end modules or the HTML templates into a plain text file, then copy and paste back to the WordPress CMS. Copying and pasting directly from the web often leads to the inclusion of unwanted styling but copying from HTML files presents its own challenges. This will happen post-development but before handover to the IPO as part of our usability testing phase. From that point on, all content on the existing pages will be editable.

Content Testing

Section 5.3 of the ITT states that user testing of the training modules has already been carried out by business and business advisers. We would expect to be given access to those findings and to meet with the IPO product owner or sponsor to discuss the interpretation of that feedback. We would then work with the IPO to put together a series of agreed requirements from that feedback and ensure that the new templates met those requirements. We would use genuine content from the modules in the mock ups, in order to accurately test different presentations and see if the existing layout is logical and successful from a user perspective.

While the time frame does not allow for extensive user testing during the process, it might be appropriate to test some layout options by presenting visuals to those third parties involved in the original survey. We could collect feedback either through an online survey or via informal teleconferences. We are happy to communicate directly with those third parties, and have done so in the past for projects where a similar approach was taken. We would then revise the template designs to incorporate any additional feedback.

5.2 Technical Overview

We confirm that we have read and understood the Technical Overview as provided in the ITT and understand that all design and accessibility work must follow GOV.UK best practice and guidelines.

We use GitHub as standard to employ strict versioning control, and each release will be made available to the IPO complete with documentation and notes. If IPO policy does not allow for Github use, we can set up our own Git server to store, deploy and back up code. The template code will be packaged using standard WordPress template format so that the files can be added and removed from the site by the IPO if required.

We understand the need to issue a test release for review 2 weeks prior to the final release, due at the end of March. Each release will include installation instructions and quality reports.

We are happy to use the tools suggested in the ITT (PHP Mess Detector and Zap Attack Proxy) to issue quality reports. Where appropriate, we may also use CLoC which provides a report on the code base, including the number of lines of code, number of files, all across programming languages (PHP, JavaScript, etc.).

5.3 High Level Business Requirements

We envision a process of fact-finding and research at the start of the project, based around a face-to-face meeting with the IPO at their premises. A tour of the website back end and a chance to speak with the IPO product owners would be the best way of ascertaining the current set up and any usability issues. The ITT document states that there is user feedback available from businesses and business advisers and Ghost would expect to be given access to this material and be taken through it by relevant IPO staff.

The user stories and feedback from the initial user testing would be used by Ghost and the IPO to collectively draw up an agreed series of clearly defined project goals, recorded in a document and stored on Ghost's Basecamp software. Ghost would constantly refer back to during the execution and control stage of the work to ensure the project fulfils the requirements.

It may also be advisable to find out if any of those businesses or advisers would be willing to give feedback during the testing process. This could be kept as an informal process in order to keep to schedule.

5.4 Budget Constraints

As laid out in the ITT document, we understand that the budget will be fixed, and we have no expectation of further financing. We have a practised methodology and a way of working that we believe offers the best value for money for the IPO. We will minimise the risk of exceeding the budget by careful consideration and planning in the requirements stage. Our open reporting structure and regular updates means that any changes that would affect the budget will be quickly identified and acted upon. We do not propose to use subcontractors which minimises the risk to Ghost financially, and we accept that any changes that come out of testing, etc, will be dealt with at our own expense and time.

5.5 IPO Timetable

The IPO has requested that a test release be issued two weeks prior to the final release, due at the end of March. Assuming a start date of Friday 20th February and an end date of Friday 27th February, this implies an initial delivery date of Friday 13th March. This creates an initial development period of 3 weeks.

Our proposed project timetable is as follows:

Project Phase	Dates	Working Days in Phase	Person Days Required
Definition of requirements		1	1
Template design, feedback & revisions		1	1
Coding PHP templates		1	1
Writing template stylesheets		1	1
Ghost testing & revisions		1	1
Handover to IPO		1	1
IPO Testing phase		1	1
Code revisions based on IPO feedback		1	1
Post-Go Live		1	1

N.B. This table does not include project management, outside of the initial fact-finding stage.

Due to the short time frame, we would ring-fence all members of the team for the whole of the 10 day development period (10 person days) and assign level 1 priority to the 10 day IPO testing phase (10 person days) with the expectation of using 10 person days across the project as a whole. By reserving the development period in its entirety, we can ensure project completion within the time frame, and by guaranteeing immediate response during the testing phase, we ensure that the costs stay within the allocated budget. For more information, see the next section, 5.6: Project Duration & Resource.

5.6 Project Duration & Resource

Allowing for feedback time between design iterations, requirement definition, testing and sign off, we estimate that this project will be 10 working days in duration, requiring a total of 40 person days, split across the following roles:

Role	Activities	Days Required
Project Manager	Project plan and timetable, client liaison, requirement definition, phone calls, meetings, milestone management, cost management, functional testing, usability testing,	1
Technical Director	Requirement definition, project plan and timetable, phone calls, meetings, requirement definition, cost management, planning development approach, scheduling development milestones, functional testing, usability testing, code revisions	1
Lead Developer	Requirement definition, planning development approach, scheduling development milestones, coding PHP templates, functional testing, phone calls, meetings, versioning, deployment, code revisions	1
Front-End Developer	Writing stylesheets, CSS revisions	1
Web Designer	Initial template designs, mock up revisions based on feedback, design sign off process.	1
Total Number of Days Required		40

5.7 IPO Resources

Response not required

5.8 Location of Work

The IPO has identified a requirement for an on-site presence during the early stages of the process for requirement gathering and definition of activities. Due to our location in the South-West, Newport is easily accessible via train and car and we can confirm that we are able to fulfil this requirement.

The most cost-effective location for the development work to be carried out is at the Ghost studio in Frome, Somerset. We have years of experience working remotely with our clients, many of whom are based abroad, and as such have a tried and tested method of data gathering, fact finding, task definition and sign off.

We make good use of online project management tools, such as Basecamp for file sharing and task allocation and discussion, as well as to-do list management. The IPO would be provided with access to the project account, allowing them to oversee progress, add comments, assign to-dos and sign off completed tasks. We use Dropbox and Hightail for asset sharing and Github for deployment and version control, which IPO will have access to at all times and also use Skype for video and teleconferencing, and instant messaging where appropriate.

For more information on our working processes, read about our Project Management Approach in the next section.

5.9 Project Management Approach

Ghost have appointed a Project Manager to steer the project and manage reporting, changes and risk. The Project Manager will be the main point of contact between Ghost and the IPO.

Ghost have extensive experience with turning around projects in limited timeframes without compromising quality and project goals. This is achieved by employing Agile Development project management techniques. For a project of this scope and duration Ghost would recommend using an approach that is similar to a traditional project management methodology based on a 'light touch' adaptation of the PRINCE-2 framework.

The project is not large enough, or long enough in duration to merit a full and formal use of the PRINCE-2 framework, but elements of the framework would prove valuable. We feel it is important to firstly identify clear project outcomes and set in place a plan and structure of reporting and testing that refers back to those goals at every point in the process.

While we propose to use Agile techniques throughout this work, as the end goals are clear and the duration of the work fixed, the project can be run as a traditional project management methodology of Planning, Execution, Control and Closure.

Beyond the planning phase there is scope for Agile methods to be employed throughout, leaving room to accommodate refinements, during the execution and control phases. A 'light touch' framework would ensure that the work remains focussed on the project goals and that any change or risk is handled, recorded and reported back to the sponsor.

For further details on this methodology, see Section 4.3 Methodology.

The communication and proposed reporting and meeting process is outlined below.

Reporting

Of paramount importance to the success of this method is a clear, open channel of communication and a transparent process that enables a project sponsor to quickly gain an overview and understanding of:

- The current phase of the project
- What work has been carried out
- What work is yet to be completed
- Any questions from the development/design team that need sponsor input
- What risks are involved and how that risk is being managed
- Any changes that have come about during the work and how these changes are being accommodated into the overall project plan

To provide this open channel of communication we would provide log-ins to the online project management software, Basecamp for relevant IPO staff.

Using Basecamp, we would create a series of 'live' to do lists and associated documents for those involved in the project to refer to. Basecamp will be used to serve the change reports and the risk register/reports. Relevant IPO staff will receive notification via email when these are updated, and the online versions on Basecamp will always be up to date. There is also a trackable audit trail of changes to the documents.

We would also use Basecamp as a repository for recording discussions and hosting project reports. The IPO would be able to add comments and questions to any of the reports and to-dos on Basecamp which Ghost would respond to through the Project Manager. A separate to-do list would be used for agreed issues to be resolved. In this way the process is formalised and recorded in a manner that doesn't interrupt the flow of work for the development team.

It is envisioned that these reports, to-dos and discussions will act as support for scheduled progress calls (either teleconference or video conference) between Ghost and the IPO. The reports and documentation housed on Basecamp would be:

- Project goals/business case
- Project Plan
- Project Schedule with milestones
- Risk Register
- Change Register
- Progress Reports/Summaries
- To-do lists
- Agreed Issues
- Testing/Bug list

As well as Basecamp, which acts as a library and central repository for project management documentation, we utilise GitHub to manage versioning, deployment, and to audit code. IPO staff can be given access to the project on GitHub in order to see at what stage the work is at and see the code itself. GitHub also acts as documentation of the process as each deploy and sync is annotated with notes from the developer. Therefore anyone viewing the record or history of the project will be able to understand what has been done, even without a code-level technical skill-set. In this way a project sponsor can have full confidence in the transparency of the process.

We can also use GitHub to 'roll back' to previous versions of the code as the work progresses, which allows for the full realisation of an Agile approach to development, linking in with the 'light touch' approach to project management.

Communication

Face-to-face meetings

We suggest that there should be at least two face-to-face meetings between the Ghost Project Manager and IPO staff.

The two meetings that must be carried out at the IPO premises are:

1. Project commencement/exploratory meeting:
This is the definition and requirements gathering phase. In this meeting Ghost would expect to be introduced to the project sponsor/s and relevant IPO staff and be given a 'guided tour' of the sites and how they are used. There would be an examination of the project goals, with reference to the 'Must haves' and 'Would like to haves' given in Annex D of the ITT. Those goals would then be agreed and if necessary, the project plan/schedule will be revised to accommodate any changes. We would create relevant IPO staff user log-ins for Basecamp and GitHub and demonstrate the use of the project management software and version control. A schedule of reporting and the form those reports would take would be agreed, and the necessary resource would be factored in.
2. Completion/Handover meeting:
This meeting would take place at the end of the project but prior to the 90 days warranty period. At this point the work

should be tested and ready for launch and the meeting would be to formalise completion and ensure smooth handover. The process for dealing with any issues that arise during the requested 4 week post-launch period would also be discussed.

Although those are the minimum of meetings we believe to be required, it may be prudent to factor in a meeting at the commencement of the IPO testing period to discuss the process of feedback and response.

Telecoms meetings

At the project commencement meeting a schedule of communication will be agreed. The 'light touch' project management methodology and use of Basecamp means there is a clear and open channel of communication between Ghost and the IPO, but there will also need to be a formal series of calls. We will be led by the sponsor's requirements.

A daily catch up call is often the best opportunity to discuss anything arising between the Ghost and IPO project managers but more formal teleconference with multiple stakeholders may be needed at key points or milestones. These instances would be at the recommendation of the IPO. During these calls, the material on Basecamp will be referred to and any actions, requirements and minutes of the calls will also be recorded on Basecamp.

Charges will also be discussed prior to invoice submission. For transparency, we break down all charges by task on invoices and these can be marked for approval by the IPO.

The Ghost Project Manager would be available to the IPO by phone or email without prior arrangement for the duration of the project.

Work location

Due to the limited time frame and duration of the project, the best value for money would be achieved by the majority of the work being carried out by us at our studio in Frome, Somerset (see section 5.8 Location of work).

5.10 Ability to Deliver

Ghost confirms that all three persons named in this proposal will be available at the start of the project and throughout the project. There is currently 1 day of planned absence within the proposed project schedule, and appropriate cover will be provided by another member of the team. We confirm there will be no effect on the schedule or delivery timetable through this absence.

5.11 Testing Approach

We employ a continuous testing and pre-handover testing approach.

During development, our developers use a range of commonly used platforms to test as they progress (see 4.1 equipment list). Once the initial development is completed, a round of internal testing is performed both by development and project management staff. Any issues raised are logged via Basecamp, tracked and re-tested.

Internal testing at Ghost will cover any server errors, browser errors, display and rendering issues on different platforms. The project team will conduct initial usability testing and take any action necessary.

Browserstack testing software is used to test that the site views correctly for all supported browser versions and platforms, and online tool Screenfly used to check some of the less common screen sizes and resolutions.

For IPO user acceptance testing (UAT) and usability testing a staging server will be provided by Ghost. However if the IPO prefers, an internal IPO staging server can be used. Any issues raised will be tracked and discussed via Basecamp with the IPO, who will be responsible for the closure and sign-off of each issue.

5.12 Post-Go Live Support Arrangements

Once handed over, the IPO will administer and support IP Equip and Online IP Master Class.

Following handover, Ghost will provide support for any and all bugs and errors presented by the IPO during administration of IP equip and Online IP Master Class. This support is provided as a guarantee of our code for up to 90 days post-handover. For more information on this guarantee, please see section 1: Management Summary under Warranty.

For any support requests that do not relate to bugs or errors, we have allocated ■ hours across the 4 week period to assist with any issue raised by the IPO where it is within our power to do so. Ghost will also be able to provide instructions and training assistance to the IPO should any questions arise concerning use of the templates provided as part of this project.

A separate Service Level Agreement to this effect can be supplied if required.

N.B. The support allocation can be increased should the IPO feel a greater allowance would be more appropriate.

5.13 Acceptance Criteria

Acceptance criteria will be worked out between Ghost and the IPO following the definition of requirements during the development phase.

5.14 Presentations

Should Ghost be shortlisted for this tender, we will be able to make a presentation to the IPO based on this proposal.

Please note that due to existing commitments, not all members of the team detailed in this tender are available on Tuesday 17th February or Wednesday 18th February 2015.

5.15 Assumptions

Throughout this proposal we have mentioned assumptions where they have informed our solution. Please find below all remaining assumption on which this proposal is based.

General

We assume that the servers hosting the training tools use Linux, Apache, PHP, MySQL (although we can work with any WordPress compatible platform)

We have assumed that the IPO have collated feedback from the user testing mentioned in section 5.3 of the ITT and that this feedback will be made available to us.

Multisite Wordpress (version 4) installation at <http://ipo.gov.uk/blogs>.

Each site sits under this installation at the following addresses:

<http://ipo.gov.uk/blogs/equip/>
<http://ipo.gov.uk/blogs/masterclass/>

IP Equip

Modules made up of Wordpress pages. Each page uses a page template which is re-used for each module with the text/content editable.

Those templates include:

1. Identify (Index of Modules)
2. Protect (Text and Video)
3. Benefits (Text and Quiz)
4. Planning (Text)
5. Disputes (Text and Quiz) [Requirement: Remove this page]
6. Summary (Text and Quiz)
7. Document Library (Text and Document Library)

New modules can be created by creating further pages using the templates listed above.

Cookies are used to save progress through each module.

Online IP Master Class

Modules made up of Wordpress pages. Each page uses a page template. The content is currently hard-coded into each template. Therefore the page content is not currently editable using Wordpress.

New pages can currently be added using Wordpress however since the existing templates contain hard-coded content they cannot be reused to create new modules. Once templates have the content taken out and moved to editable fields within Wordpress, those templates will be reusable.

Cookies are used to save progress through each module.

We have noted the specific reference to the IP Online Master Class and the need for user activity to be resumed across devices. From our initial testing via the supplied login, it appears that this is existing functionality and needs to be replicated during our period of development. If there are any changes to be made to this functionality, it can be further defined during the requirement gathering phase and added to the project development plan if necessary.

4. Charges

The charges laid out in this section represent a fixed cost project and we understand that no further financing will be forthcoming.

Rate Card

Role	Charge per Day	Total Number of Days Required
Project Manager	■■■■	■
Technical Director	■■■■	■
Lead Developer	■■■■	■
Web Designer	■■■■	■
Front-End Developer	■■■■	■

Cost Summary

Template design and development & associated project management	£22,400
Post-Go Live Support (4 weeks)	£2,240
Total cost (excluding VAT):	£24,640
Total cost (including VAT):	£29,568

Travel & Expenses

We are happy to comply with your department expense and travel policies, and apply no admin fee or mark up.

Potential Further Development

Our rate is ■■■■ + VAT per person per day or ■■■■ + VAT per person hour. We track time per task and bill in 5 minute increments.

Any development that is outside of the scope of those requirements identified in Phase 1 will be quoted for separately as additional work. No additional work will be undertaken without written confirmation and acceptance of costs from the sponsor.

We will always seek to find the most robust and cost effective solution on your behalf.

5. Other Information

Testimonial

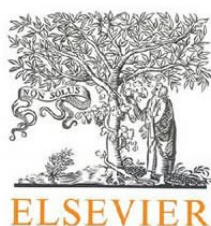
"Ghost worked with us to design and produce a user-friendly widget providing easy access to data that was previously only accessible through a complex API. This was a vital project as part of a wider campaign for a national government agency.

Throughout they were resourceful, dedicated and creative in the way they approached things. From interface design through to database integration they handled all that was thrown at them in a calm manner and kept the end goal in mind.

The results were very successful in increasing the reach and accessibility of the API data and the project is now being shown as an example of best practice within the government agency. Ghost come highly recommended."

[REDACTED], Digital Director at [REDACTED]

Previous Projects



Appendix A: Staff CV



Creative Director



A committed and hard-working project manager and designer with excellent communication and people-skills, [REDACTED] has a proven track record in delivering projects on time and within budget to a consistently high standard. His training in animation, photography and film-making has allowed him to develop a rare mixture of creative, design, technical and management skills.

Experience

Creative Director
Ghost (Digital) Limited, 2012–Present

Designated Partner
[REDACTED] 2006-2012

Intranet Manager
[REDACTED], 2001-2006

Deputy Operations Manager
[REDACTED], 2000-2001

Freelance Animation Director
[REDACTED] of the moving image, 1998-2000

Education

BA Hons, Film & Photography University of Wales College, Newport 1993 - 1996

Technical Experience and Skills

Skills: Project management, Graphic design, Illustration, Film direction and production, Screen-writing, Digital strategy, Team management

Technologies: HTML, CSS, Adobe Edge Animate

Appendix B: Staff CV



Technical Director & Founder



A skilled front-end developer and strongly people-focused, she has a great deal of experience in customer service and end-user experience and shows excellent attention to detail. An experienced business manager and creative strategist, [REDACTED] is a motivating and organised manager with an excellent range of technical skills who displays a genuine commitment to delivering top quality digital products.

Positions Held

Technical Director & Founder

Ghost (Digital) Limited, Aug 2012 – present

Designated Partner



Aug 2008 – 2012

Intranet Editor



, Oct 2006 – Jul 2008

Assistant Intranet Manager



, Feb 2003 – Sep 2006

Education

BA Hons, Drama

University of Wales, Aberystwyth

1997-2000

Technical Experience and Skills

Skills: Project management, Copy writing, Proof-reading & editing, Storyboarding, Script writing, Cost management, Operations management

Technologies: PHP, CSS, HTML, HTML5 Javascript, jQuery

CMS & Programs: WordPress, Joomla!, Photoshop, Fireworks, Dreamweaver, FunnelWeb

Appendix C: Staff CV

[REDACTED]

Head of Development

[REDACTED]

While studying a-level computer science in 1996 [REDACTED] co-founded [REDACTED], an early web site hosting company as the first web boom exploded. Eager to provide companies with a presence on this new World Wide Web, [REDACTED] and his colleagues helped many business build their first web site. [REDACTED] was later successfully sold and [REDACTED] turned his focus towards larger online systems and network infrastructure working with businesses such as [REDACTED] and [REDACTED]. He then returned his focus to the web and particularly Ecommerce helping businesses who now already had web sites but were not yet selling their products online. One example being [REDACTED] who went from selling nothing online to their web store becoming their biggest selling outlet across their whole business. As well as systems design and management [REDACTED] is an experienced developer in many technologies and delights in providing elegant and reliable services and solutions to clients.

Positions Held

Head of Development

Ghost (Digital) Ltd, Jan 2014 - present

Ecommerce Consultant

Self Employed, 2011 – Dec 2013

Technical Director

[REDACTED], 2005 – 2011

Infrastructure Specialist

[REDACTED], 2001 – 2004

Director

[REDACTED], 1996 - 2001

Education

B.Sc. Computer Science

Lancaster University

1998 - 2001

Technical Experience and Skills

CMS: WordPress, Joomla, Concrete5, Drupal, Bespoke CMS developed by Ghost for clients

Technologies: HTML, HTML5, CSS3, JavaScript, jQuery, PHP, .Net, C#, ASP, vbScript, Java, XML, XSLT, JSON, SQL, RESTful and SOAP web services

Systems: Linux, Windows, BSD, Darwin, VMWare, vSphere (Cloud virtualisation), Cisco IOS, McAfee Firewall Enterprise

This bid is valid for 90 days.