

The HUB-Co CU – Web Premium Design

The D+H Cavion Web Solutions Team will be implementing the following new products (shaded), detailed below:

Web Premium Design	iFrame for Banking Log-in	E-Statement Opt-in* * coordinated with Implementation
Hosting & Support Basic	SSL Certificate(s)	Quarterly Compliance Reviews

Project Plan – 18 Aug to 25 Sept 2014

	Start	Due Date	Responsible Party
PHASE 1 – 1 month before			
Welcome Email		8th Sept	Both
Choose a Theme**	8th Sept	15th Sept	Client
Project Plan with requirements sent		8th Sept	Cavion
CMS Training scheduled	8th Sept	15 th Sept	Both
Signed Project Plan received**		15th Sept	Client
Project Plan Requirements received (see below)**		15th Sept	Client
PHASE 2 – weeks 1 & 2			
Project Kickoff Call		22 Sept	Both
Theme Install & Banner design		24 th Sept	Cavion
Theme & Banner review		26 th Sept	Both
Site Content Review		1 st Oct	Client
Theme & Banner edits	26 th Sept	1 st Oct	Both
CMS Training – level 1 attended	29 th Sept	3 rd Oct	Client
PHASE 3 – weeks 3 & 4			
Theme & Banners finalized		3 rd Oct	Both
CMS Training – level 2 attended [if required]	6 th Oct	10 th Oct	Both
PHASE 4 – weeks 5 & 6			
Website & Content Finalized	13 th Oct	17 th Oct	Both
Pre GoLive Website Freeze	20 th Oct	23 rd Oct	Both
GoLive Date		24 Oct	Both
Post GoLive Active Support	24 Oct	31 Oct	Cavion
Final Turnover Date/End Active Support		31 Oct	Cavion

** Stop Points: If the requirement for this point has not been met by the due date, there is the possibility that the entire project could be put on HOLD and rescheduled at a later date, which may be many weeks in the future. There are several delay days built into the project but once those are exceeded, the project runs the risk of overlapping other client's slotted, web design timeframes.

Project Plan Requirements

1. **Client Logo** – large, high DPI graphic in one of the following formats: PNG, PSD, AI, EPS, JPG. No GIF files can be accepted. Logos must be sent digitally, an email attachment is best. We cannot accept logos sent by FAX. A great quality logo is the basis for the website design and **we cannot proceed without it.**
2. **Content** – Content is the most important part of a successful web design. Client should put the gathering and writing of content FIRST in their queue. Having all content in hand should be a priority going into the Project Kickoff Call.
3. **Color Scheme** – base color choices for website. 2-3 colors are optimum. Can refer to logo for color match. Best matches come from colors expressed as HEX or RGB numbers.
4. **Contact List** – names/phone numbers/email addresses/titles of the people who will be involved in the website design process and the people who will be involved in website content & editing
5. **Website References** – the URL addresses of websites that the client likes and wants to refer to during the initial design kick-off call. These will be for reference only. Many designs cannot be duplicated or reproduced in a responsive environment.
6. **Q & A** – questions the client would like answered before & during the project kickoff call
7. **Graphics/Photos** – graphics and photos the client would like to use on the website including staff pictures, photos of the Financial Institution, events etc. 10 royally-paid photos from Fotolia® are included in your design.
8. **Promo/Ad Banner(s)** – tag lines, graphical ideas, and marketing direction the client wants on their promotional, front page banner graphic(s).
9. **Affiliations & Links** – logos and URL addresses of affiliated entities

Initial Content – 5 Pages (Cavion)

1. The client will select 5 pages of the website in which content (including graphics/photos) will be entered by Cavion. The HOME page and main RATES page must be included.
2. All content for the 5 pages must be provided to Cavion by the project plan date. Content can be in the form of text files or Word/Office docs sent by email. Please do not embed graphics or photos into a doc – attach them separately. Editable PDFs are accepted. *If the client has a current website designed by Cavion, we can copy content from that website. We cannot copy content from a 3rd party designed website.*
3. The remaining 3 pages chosen are usually the more complex pages on the website, such as pages with tabled content.
4. These pages can act as a solid reference point for the client's own page & content creation.

Pages of Content (Client)

1. Client is required to enter all content except for the 5 initial pages that Cavion will enter as a starting & reference point. All content should be gathered and/or written by the end of Project week #2.
2. Client must attend level 1 training on the Content Management System (CMS) before content entry. Up to 6 personnel may attend.
3. Client will be given access to a royalty-paid picture service to choose graphics & photos for the website. There is a limit of 20.
4. Clients who purchase the Basic Hosting and Support package must also attend the level 2 CMS course. This course covers more complex features and prepares the attendees (limit of 2) for the role as an administrator of the website. This course can be waived by signature for those with advanced skills or for those purchasing Deluxe Hosting & Support.
5. Support for content entry will be available during the active phases of the project.
6. **For a supplemental by-quote fee**, all content can be entered by Cavion, but it is not recommended. By entering content and creating pages, the client(s) becomes familiar and comfortable with the CMS and will be better prepared for all future edits and additions that may be required.

1. Website Solutions

- Website Design – D+H offers responsive themed designs plus fully custom designs allowing Customer to choose the option that best meets its unique Internet strategies and budget. All websites include our Content Management System (CMS), which enables Customer to manage its website pages in a secure environment without technical programming knowledge, and includes unlimited pages, financial calculators, website backup, Google Analytics integration, site search, user management, default-friendly URLs, future-publish, archived page revisions and drag and drop file uploading. Customer is solely responsible for the compliance of its website and content contained therein, even if such content includes or is based upon templates or forms provided by D+H. Customer should engage its counsel or compliance officer to review such content.
 - Web Premium Design[®] – Includes set up fee, choice of templated theme, limited design edits, four (4) custom promo graphics with rotating plug-in, four (4) vetted widgets/plugin-ins, training and certification on the CMS system, and 5 pages of content entry. Hosting and Support package required. Additional promo graphics and editing/development hours available by quote.
- Hosting and Support
 - Hosting and Support Basic –includes 4GB of secure disk space on D+H’s firewall-protected servers, level 1 training/certification on the Wordpress Dashboard CMS (up to six (6) people), level 2 staff training/waiver on the Wordpress Dashboard (two (2) people), and two (2) hours of monthly technical support by Professional Services. This option includes help with basic CMS functionality and updates during normal business hours. Theme & template redesign, customization and banner creation are not included.

SSL Certificate and iFrame for banking log-in

I understand that if D+H has completed the design & development of this website, that billing will be triggered on the scheduled GoLive date, although the new website itself may not be active. Activation will then occur at the client’s discretion upon informing D+H with 1 week’s notice, but no later than 60 days after trigger.

Client signature/date _____

Designer signature/date _____

NOTE: Creative design is always a matter of choice and preference. Our designers are highly trained and follow the current standards for website design. If we feel that a client design request made during the project falls outside of acceptable standards, will compromise the responsive capabilities or security of the website, or will reflect poorly on the client or D+H, we will offer alternative solutions if possible. If no alternative solution is possible, we reserve the right to decline the request.

IMPORTANT – Responsive display in e-readers: Responsive design is made to work with most smart phones, tablets and PCs. E-readers such as the Nook and Kindle are not tablets. While they usually have internet capabilities, the functionality may be slightly compromised over what is available with a true tablet. Your responsive design will function fairly well in an e-reader, but it will not be perfect.

IMPORTANT – We design all our websites to function properly in the most recent versions of all the major browsers, especially IE and Firefox. Functionality is sometimes affected by viewing a website in an older version of a web browser. We do everything we can to ensure your website can be viewed as intended by the majority of visitors.