

AFFILIATE WEB SERVICES

SAMPLE STATEMENT OF WORK & CHECKLIST

Notice: This sample SOW is provided as a reference only. No representation is made that it is complete or adequate for a specific use. The information, checklists and text included below are intended to be used as a starting point for the affiliate to develop its own unique statement of work and solicitation. Contributors to this sample include: Mike Taylor, C.PM. ;

Suggestion: Web site hosting and Web-based service providers have a lot of competition. The best course of action is to develop a list of minimum services required, ask for proposals and evaluate the extra services, features and functionality which might be offered. Just as in procuring hotel space, a basic room can be obtained inexpensively, but a location with extra features and facilities might be more desirable. Also, you can spend a lot of extra money for features that are never used. DO NOT believe any offeror who says they are exclusive, unique or the lowest price. Web hosting services is a very competitive environment. - Taylor

PURPOSE:

1. To obtain and maintain a professional and functional web site which serves the needs of affiliate members by providing timely, accurate information and web-based services as identified below.

SCOPE:

1. Contractor shall furnish materials, software, programming skills, internet access and web site hosting servers as required to provide a reliable, functional service adequate to meets the needs of the affiliate as described herein.
2. Affiliate will procure and maintain control of the affiliate web domain name and provide the contractor with technical access if needed to update the domain DNS pointers.

DELIVERABLES:

1. Within 30 days after award: Arrange & hold discussions with affiliate key contacts to discuss web site content, layout and functionality. Confirm an adequate understanding of the affiliate needs and verify that services offered will be able to satisfy those needs.
2. Within 60 days of award: Initial web site to be active on the web for review and updating by affiliate officers.

3. Within 14 days after the initial review, corrections and updates will be made and the web site will be suitable for general access by affiliate members and members of the public.
4. Web site updates provided by the affiliate Key contacts must be made to the web site within 1 week of receipt.

KEY CONTACTS:

1. Affiliate key contacts and person responsible for web site content review and updating are:

CONTRACTOR CONTACT INFORMATION:

Contractor will provide an email address which will be used for updates and notices. Email requests from affiliate Key contacts must be responded to within 2 days. In addition contractor must provide a phone number which may be used when urgent and immediate action needs to be taken to the web site. When required urgent and immediate attention request must be handled within 12 hours of the call.

OWNERSHIP:

Contractor will retain ownership and rights to the web site design, layout and any customized functionality.

Affiliate retains all rights and ownership of the logos, data and information used and displayed in the web site. Upon conclusion of this agreement, and/or notice to discontinue the service, contractor will permanently delete the affiliate data and information. Contractor agrees that information about members is personal and private and will maintain control and limit access to such data.

Affiliate retains all rights and ownership to the domain name including the right to redirect the DNS pointers to another web host and/or web site without notice to the contractor.

Contractor may not display advertisements, or use the affiliate web site or affiliate data for any purpose other than producing and maintaining the affiliate web site.

FUNCTIONALITY REQUIRED

1. Web site of up to 100 MB of linked pages, newsletters, articles, features, files, etc.
2. Secure, password protected members-only area

3. 5 redirect email addresses or use by affiliate officers/key functions. Email functionality must be protected by anti-spam controls to reduce the amount of spam. Example: dinneregistration@affiliate.com ; membership@affiliate.com
4. Subscription-based newsletter mailing list and email notification list.
- 5.

SOW CHECKLIST – items/issues to consider in acquiring web site services:

1. Data ownership and prohibition against misuse of affiliate data is written and clear. Example: affiliate mailing list cannot be sold.
2. Data backup plan. The web site, member database, newsletter archive, etc. should all be backed up on a regular basis and a backup copy be provided to the affiliate on a regular basis for archiving purposes.
3. How much space and how many email addresses do we need? Best way to proceed is to start with a small space and see what is actually used. The web site programmers can easily tell after a few days of work. Generally 100-500 MB is more than adequate. Most hosting services allow dynamic increases in size – that is, if the web site size exceeds the agreed service, it can be expanded for a fee. Determine in advance what the cost would be for an increase in hosting space (if any). Redirect mail boxes are generally included with the hosting service and quite a few should be available at little or no cost. (A redirect mailbox is a mailing address at the affiliate web site which automatically forwards to an identified person in the affiliate – thus protecting his mailbox from public display. Example: programreservations@affiliate.com could automatically forward to the affiliate program chair.
4. Membership database functionality should be carefully considered as it adds significantly to the complexity of the web site and to the risk of data loss. Compare the need to the advantages of using the ISM membership functionality information on file.
5. Do you need a newsletter preparation and email service? That is do you want the web site host to prepare and distribute a newsletter based on data and article provided by affiliate officers? If so, specify a maximum amount of time that will be allowed for preparation and distribution of each newsletter once the articles have been provided. If the newsletter is also used to announce programs, be sure to specify a deadline for delivery.
6. Suggest reviewing other affiliate web sites to look for features or functionality that you may want to request or avoid.
<http://www.ism.ws/about/AffiliateWebsitesList.cfm?navItemNumber=5454>

WEB SITE MANAGEMENT ISSUES TO CONSIDER

1. How will the site be updated? When the newsletter changes, BOD phone numbers change, etc. How will those changes get made to the web site?

2. One option might be for the web site management company to provide the update service. In that situation be sure the following is addressed in the agreement:
 - a. Designate a specific person(s) who will be authorized to submit changes. Maybe a key contact for each section of the web site or one central contact for the whole site. Consider the potential for a bottleneck if the key contact is on vacation or suddenly changes companies. Consider also the potential for a disgruntled former member submitting changes that would be embarrassing. Identify in the agreement, how authority for key contacts will be identified, changed, updated and removed.
 - b. Include a response or update time for the service provider to make changes that have been submitted. Certainly if the meeting location changes, it can't take two weeks to post the notice.
 - c. Expect to pay for the updating service. Either payment on a per-transaction basis or a flat fee for a reasonable number of changes per month. Recognize in agreeing to a payment method that most minor changes (phone number updating, etc.) take just a matter of a few minutes – but that it may take days before the update reaches the top of the priority list for the person who has to do the work. So expect to pay for the actual work and then additionally for how much priority the work is given.
Example: 24x7 help desk availability vs. take 2 aspirin and call us in the morning.
3. Another web site updating option might be to grant affiliate members the ability to log-in and make changes directly to the web site. This is a good option for making minor changes and updates.
 - a. Be sure that the methodology for granting access (through the use of a password) is controlled. Which affiliate key contacts get the password and who controls who gets it.
 - b. Be sure there is a process for changing the password on a regular basis and that the password meets secure password standards (*not the name of the president's pet kitty, but a random combination of letters, numbers and symbols.*)
 - c. Be sure the agreement includes a method for changing or turning off the password in an urgent situation. *Example: hackers discover the password and start making changes to the web site.*
 - d. Be sure there is a web-site backup and method for recovery should someone destroy part of the web site with an accidental change.

COMMENT:

1. This is a competitive business and companies selling services such as this should have considerable expertise and many references. They should easily understand and be able to explain all of the issues, comments and concerns raised in this document. Any hesitation to be forthcoming and direct could be a negative indicator.

REFERENCES:

1. [Information an affiliate web site manager must know](#). Article by Mike Taylor, C.P.M.
Basic web site management terminology.
2. [Sample Web Site Security Plan](#)
3. [Sample Trading Partner Agreement](#). Mike Taylor, C.P.M.
Useful contract words and concepts
4. [Electronic Commerce Checklist](#). Article by Mike Taylor, C.P.M.
Includes some ideas & concepts that might be useful for the management agreement.