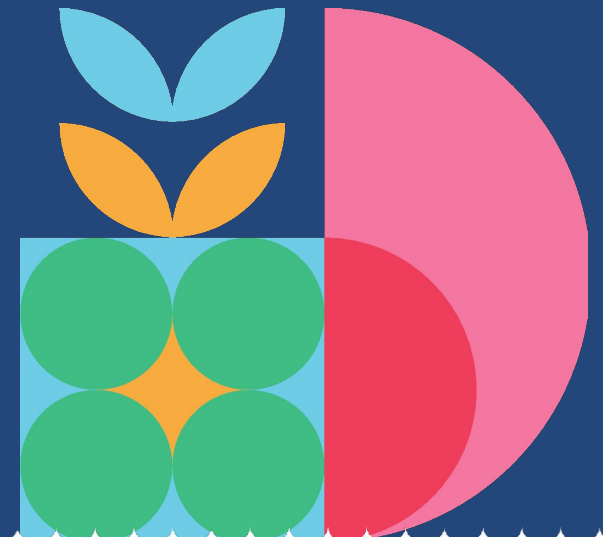


JUNE 2025

# Scottish Government

Equality and Human Rights toolkit  
Technical Scoping Document

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# What we'll cover

**Project overview**



**Scope of work**



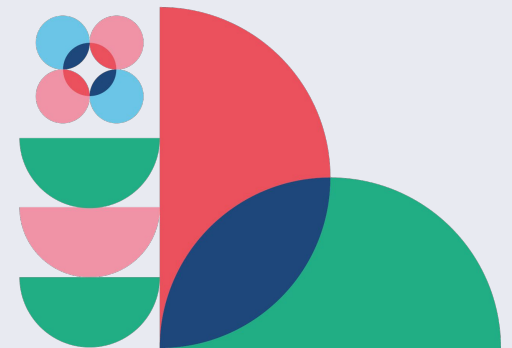
**User experience and accessibility**



**Maintenance and support**



**Timeline and milestones**



# Project overview



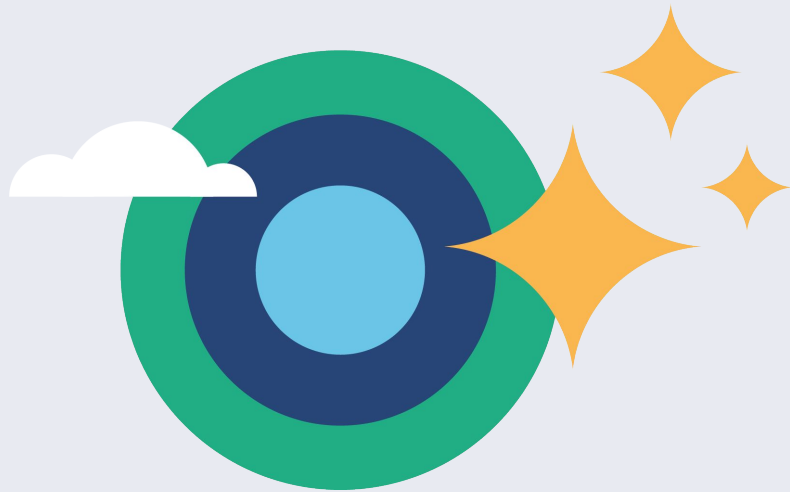
# Your requirements

Scottish Government want to create a digital toolkit to host the various resources associated with their Human Rights and Equality programme.

Overarching aim:

Key requirements:

Outcome:



To deliver an accessible, digital toolkit to host resources and learning materials for human rights and equality education.

1

As a Scottish Government programme, the website must closely follow the brand guidelines provided on the main website.

2

To be designed and built with expansion in mind - the hope is that the toolkit will continue to grow over time with more resources being uploaded. This needs to be reflected in the approach.

3

A self assessment tool which allows the viewer to receive recommendations of key content areas and actions based on a series of questions.

4

The ability for users to submit resources they feel would be helpful and/or are missing from the existing set.

An engaged audience, who are committed to using the materials and resources available to improve their human rights and equality measures.

# Audiences

## Human Rights and Equality toolkit

Summary of audience groups who will use the toolkit below:

### HR Business Partners

The main users of the website will be representatives of Scottish businesses who are seeking to improve their human rights and equality policies. Most likely HR Business partners or alternatives. (Client to confirm)

### Scottish Government Human Rights team

The toolkit and its content will be managed internally by the Human Rights and Equality team within the Scottish Government.

# Scope of work



# Content Types

Component parts of the toolkit containing relevant content

## Home

**Dedicated to providing context and signposts for users**

*This page will be a standalone style featuring signposts block to sections of the toolkit.*

*The self-assessment tool will be linked as a primary call-to-action.*

## Key Drivers

**Simple buckets of content that lead users to actions and resources**

*The Key Drivers will follow a standard approach to content management that consists of sections like:*

- Overview
- Linked Actions
- On-Page Content
- Linked Resources
- Feedback Block

## Actions

**Goals that users should consider that can be followed sequentially**

*The Actions will be positioned as items linked to a Key Driver.*

*On-page content acts as the main structure for this content type, with a sequential navigation feature to help users navigate reading content more easily.*

## Resources

**A variety of resources with a multi-category tagging system**

*The Resources will be a mixture of multimedia items with a tagging system that automatically embeds resources on their relevant Key Driver and/or Action pages.*

*Base filters MUST be:*

- Key Driver
- Implementation Level

## General Pages

**Supplementary content pages that provide context to the toolkit**

*The General Pages will contain content that is supplementary to the toolkit's main content and resources.*

*On this basis, the content will be primarily on-page content, with an automated child-page system for longer content sections.*

# Features and functionality

Introduction to the features list and their functionality

- **Pages:**

- Home Page, Inner Pages, FAQs, Contact.
- Pages will be built using reusable block-based templates with predefined field structures. This ensures consistent styling and layout while allowing editors to focus on content.
- Some pages will feature a last modified tag to identify to the user when the content shown was last updated.

- **Custom Post Types:**

- **Key Drivers** - Will serve as core thematic categories. Each entry will have its own customisable page built using blocks, allowing editors to add contextual content such as summaries, media, and calls to action.
- **Actions** - Represent initiatives or steps associated with Key Drivers. Each Action will have a full single page template editable via blocks. Actions will be categorised by the Key Driver taxonomy for dynamic display on related pages.
- **Resources** - Provide supporting files or links. Each resource will include a title and upload/link field, with optional categorisation using additional taxonomies. Resources will be lightweight and primarily used to support Key Drivers and Actions.

- **Flexible Architecture (Taxonomies & Relationships)**

- A shared Key Driver taxonomy will link all three CPTs - enabling dynamic relationships. Key Driver pages will display related Actions and Resources automatically using this taxonomy. Resources may also be assigned additional taxonomies for enhanced filtering or grouping across the site and within the Resources Block.

- **Blocks:**

- Hero Block (Home & Inner Pages)
- Signpost Block
- Banner Block
- Accordion Block & Dropdown Text Block
- Key Drivers Collection Block (Show all Key Drivers)
- Key Driver Actions Block (Show all Actions relating to current Key Driver)
- Resources Block (Show filtered resources using Key Driver or other taxonomies)
- Recent Posts Block (Show recent posts for a specific post type - Resources or Actions, which can also be categorised by Key Driver)
- Child Pages Block (Pull through all child pages of the current page)
- Page Review (Show customisable form to capture user feedback)
- Glossary Block (Pulls through global Glossary entries from ACF Options Page)
- Themed Gutenberg Blocks -
  - i. Text Areas (Headers, Paragraphs, Lists, Pull Quotes, Tables)
  - ii. Image, Gallery & Video (Embed)
  - iii. Button Group



# Features and functionality

- **Flexible Navigation:**
  - Flexible navigation system allowing for the client to make changes to what pages are shown using the wordpress backend.
  - This includes separate menus for Header & Footer.
- **Page Review Form Block:**
  - This form block will be added bottom of the some pages to find out whether the user found it helpful or not.
  - This will be built using the forminator plugin, allowing the client to change the fields as they like.
- **Announcement Banner:**
  - There will be a settings page with fields allowing you to change the announcement. If no content is found the banner will not show.
  - Will allow the user to close it, creating a cookie on the browser so that if the page is refreshed the announcement is still hidden, until the cookie times out or is deleted.
- **Users:**
  - User roles will follow standard WordPress conventions, defining clear capabilities and permissions for Administrators and Editors. Role management will ensure appropriate access to content management functionalities, maintaining site security and ease of management for content administrators.
- **Printable Pages:**
  - There will be the functionality to allow users to print each page in a styled format whilst removing header footer and any other sections that are not needed for print.
- **Glossary (ACF Options Page):**
  - A glossary will be created using an ACF options page with a repeater field for adding terms and definitions. These entries will be displayed on a dedicated glossary page in alphabetical order, with full layout control and no additional plugin requirements.
- **Submit a Resource Form (Forminator):**
  - A resource submission page will use a customisable Forminator form, allowing users to upload files or links for review. Submissions will be stored securely in the forminator submissions for moderation. Publishing will be handled manually by management team.
- **Media Library:**
  - All media assets - such as images, documents, and PDFs - will be managed through the native WordPress Media Library. These assets can be reused across content and are accessible to admins and editors. Assets submitted via front-end forms or through the wordpress dashboard will be stored in the Media Library and linked to their related content where relevant.

# Self Assessment Tool – Features and functionality

Introduction to the features list and their functionality for the self assessment tool.

- A dedicated Self Assessment Tool will be developed to help users evaluate their level of concern for each Key Driver. The tool will present a predefined questionnaire, using the existing Key Drivers as the framework for the questions which will allow the user to select their “Implementation Level” for the respective Driver. User responses will then be mapped to an "Implementation Level" taxonomy term associated with Actions.
- Based on these results, the system will display relevant Actions for each Key Driver, helping users identify priority areas. The assessment content and scoring logic will be fixed, not user-editable, ensuring consistent and standardised outputs. Results will be shown immediately upon completion, with an option to revisit or retake the assessment. The tool will be tightly integrated into the taxonomy-driven content structure of the site.
- The tool will present a predefined, mobile-optimised questionnaire in a simple step-by-step format.
- Users will not need to login to access it.
- The assessment logic will be modular to allow for future updates with minimal disruption.

Example:

- Question: How do you rank your level of [Strengthening Leadership]? In the case of Human Rights and Equality, this key driver covers the following (insert detailed blurb here)
  - Example Answers: Beginner, Intermediate, Advanced

# User flow

Introduction to the processes behind uploading data to the website from all users.

- **Front-End User Journeys:** Users can engage with the site in two primary ways:
  - By completing the Self Assessment Tool, which evaluates their current status across Key Drivers and returns relevant Actions based on their responses
  - By browsing the Key Driver collection directly on the homepage, where each Key Driver page presents background content alongside dynamically linked Actions and Resources filtered by the shared taxonomy.
  - Additionally, users can submit their own content via the "Submit a Resource" form for review and potential inclusion on the site.
- **Admin Content Workflow:** Admin users will manage all core content types via the WordPress dashboard.
  - **Pages:** Built using the Gutenberg block editor to support flexible layouts. Admins can add, remove, and reorder blocks including dynamic blocks (e.g., related Actions or Resources) and static content blocks (e.g., text, imagery, quotes).
  - **Key Drivers, Actions, and Resources:** Each CPT will be created using the standard post editor. Admins will assign taxonomy terms such as "Key Driver" and (for Resources) other terms like "Resource Type" and "Target Audience." This ensures that content appears in the correct dynamic listings across the site.
  - **Glossary:** These will be added via ACF Options pages using repeater fields. Admins can easily input structured content, such as term/definition pairs.
  - **Submitted Resources:** Resources submitted via the front-end form (using Forminator) will appear as entries in Forminator's submission list. Admins will review the content, assign taxonomy terms, and publish or reject as needed.
  - **Taxonomy Management:** Admins can create and update taxonomy terms (e.g., new Key Drivers, Resource Types) through the dashboard to reflect evolving content needs.

# Standard Processes

Information regarding our standard processes surrounding the build.

- **Accessibility (WCAG 2.2):**
  - The website will comply with WCAG 2.2 standards, ensuring it is accessible to users with disabilities. Accessibility features will include keyboard navigation compatibility, appropriate contrast ratios, meaningful alt text for images, clear focus indicators, and compatibility with screen readers to provide equal access and usability for all users. Additional accessibility widgets can be discussed and added, if required, for an additional cost.
- **Cookies and Compliance (Complianz Plugin):**
  - Cookie consent and compliance will be managed using the Complianz plugin. This will handle cookie notifications, user consent management, automatic cookie scanning, and ongoing compliance with GDPR, CCPA, and other relevant regulations. Complianz will provide regular updates to ensure the site remains compliant with evolving privacy laws.
- **OpenGraph and SEO (WPMU Smartcrawl):**
  - SEO optimisation, metadata management, and OpenGraph data will be handled using the WPMU Smartcrawl plugin. This includes generating optimised titles, meta descriptions, and structured data, as well as custom OpenGraph tags for enhanced sharing on social media platforms, resulting in improved search visibility and user engagement.
- **Security/Firewall (WPMU Defender):**
  - The website's security will be managed through the WPMU Defender plugin, providing firewall protection, regular malware scanning, brute force login protection, IP blocking, and vulnerability monitoring. Defender will ensure proactive defense against common security threats, maintaining the integrity and reliability of the website.
- **Backups (Updraft):**
  - Website backups will be regularly performed and managed through the Updraft plugin. This solution enables scheduled automatic backups, easy restoration from backup archives, and secure storage options including remote cloud services. Regular backups will ensure data safety, quick recovery, and minimal downtime in case of data loss.
- **Caching and Performance (WPMU Hummingbird):**
  - Website performance and caching will be optimised using the WPMU Hummingbird plugin. This will include browser caching, page caching, Gzip compression, asset optimization (minification and combining of JavaScript and CSS files), and CDN integration. Hummingbird ensures faster load times, improved user experience, and better website performance metrics.
- **Image Processing (WPMU Smush):**
  - Image optimisation and compression will be managed using the WPMU Smush plugin. Smush automatically compresses and optimises images upon upload, reduces file sizes without sacrificing image quality, and provides lazy loading for images. This will enhance site speed,

# Out of scope

Introduction to out of scope items - can include reasons as to why it's not included (i.e. previous conversations around priorities etc.) Could also include impact of not including a certain feature if opportunity for upsell is there.

- **User Accounts and Login System:**
  - No registration or login functionality is included in this phase; users will access all content anonymously.
  - Including login functionality would increase development scope, require user data protection measures, and alter the site's content access model.
- **Personalised Dashboards:**
  - Users will not have personal dashboards or saved progress within the assessment tool or site content.
  - Adding user profiles or dashboards would require account management, secure data storage, and session tracking.
- **Self Assessment Tool**
  - Customisable questions are out of scope, but a more advanced self assessment tool could be discussed for the future with a new scope to look at more customisable and more advanced recommendations.
- **Multilingual Support**
  - The website will be built in English only.
  - Multilingual features (e.g., WPML/Polylang) add significant complexity and ongoing translation management but may be considered later based on audience demand.

# Technical Specifications

**Platform:** WordPress (latest stable release)

**Theme:** Custom-built theme using block-based structure

- **Theme Functionality:**
  - Built using a custom WordPress theme with full Gutenberg (block editor) support
  - Includes reusable custom blocks (e.g. Key Driver Collection Block, Resources Block, FAQs Block)
  - Page templates use modular layouts to ensure content consistency
  - Dynamic content is pulled in via shared taxonomies (e.g. Key Driver, Resource Type)
  - ACF used for structured data (e.g. Glossary, FAQs, global settings)
  - No front-end user accounts or login functionality included in this phase
  - Admin login only (standard WordPress login interface)
- **Plugins:**
  - Advanced Custom Fields Pro (Custom fields & options pages)
  - Forminator (Custom Forms)
  - Complianz (Cookie compliance)
  - WPMU Dashboard (WPMU Updates)
  - WPMU Defender (Security)
  - WPMU Smartcrawl (SEO)
  - WPMU Hummingbird (performance)
  - WPMU Smush (image optimisation)
  - UpdraftPlus (backups) Logins:

# User experience & accessibility



# Design and accessibility

- **Branding**

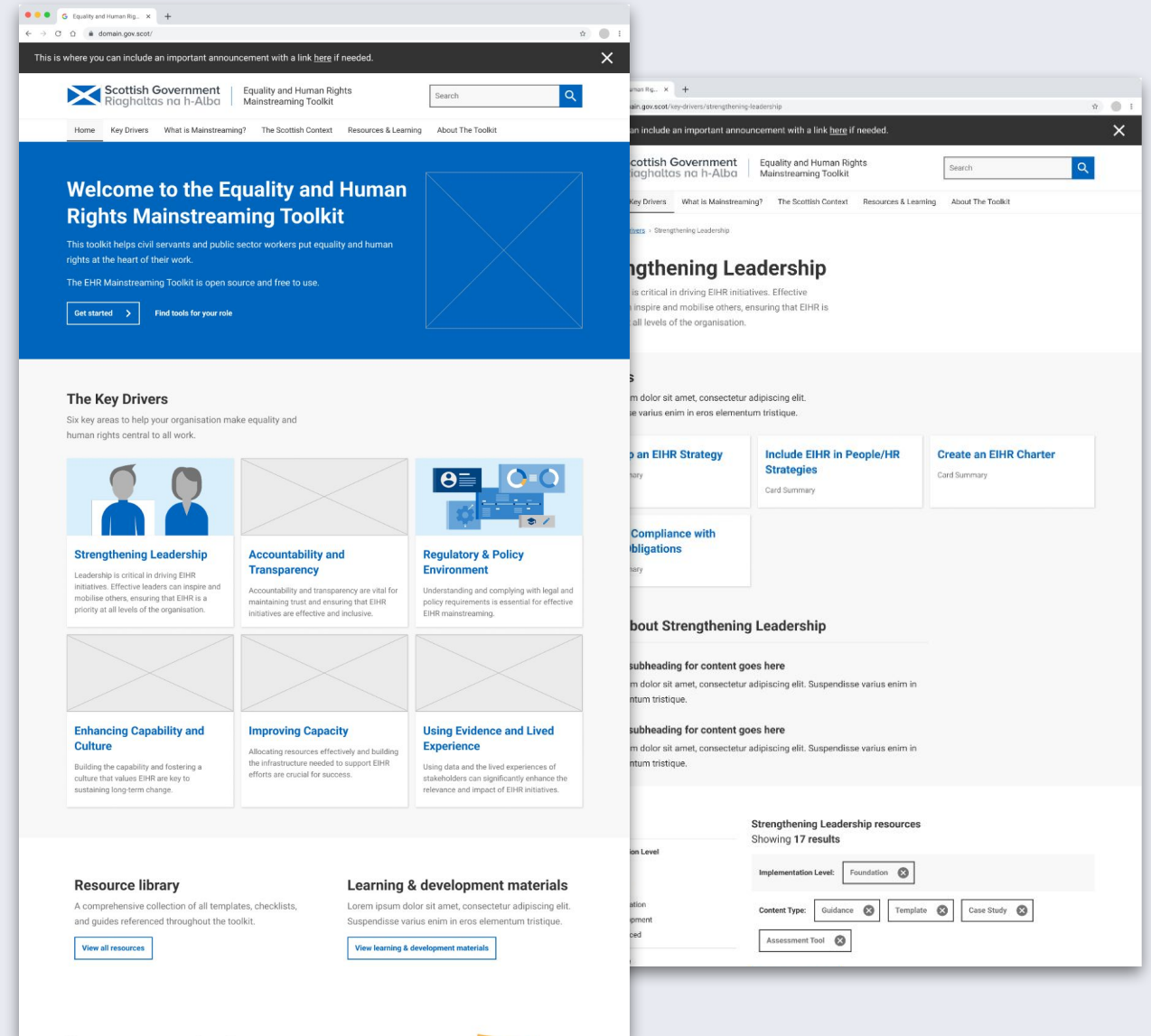
- Brand Guidelines for this project follow those created by Scottish Government.
- [Design System](#) was used as a reference for layout, colour, typography and pre-made components developed by Scottish Government.
- [Service Manual](#) is used as a reference for the design and development approach - used in tandem with the existing web development process we use at Kaleidoscope.

- **Accessibility**

- We aim to adhere to WCAG 2.2 AA as a standard for accessible colour contrast on the web, and aim to meet AAA standards where possible.
- We aim to use accessible layouts and structure across both visual design and development to improve SEO and external accessibility tools.
- We will adopt an open approach to specific accessibility requirements that may or may not be out of scope.

- **Responsiveness**

- As part of our standard process, all of our web applications are fully-responsive and browser-tested.





# Structure and navigation

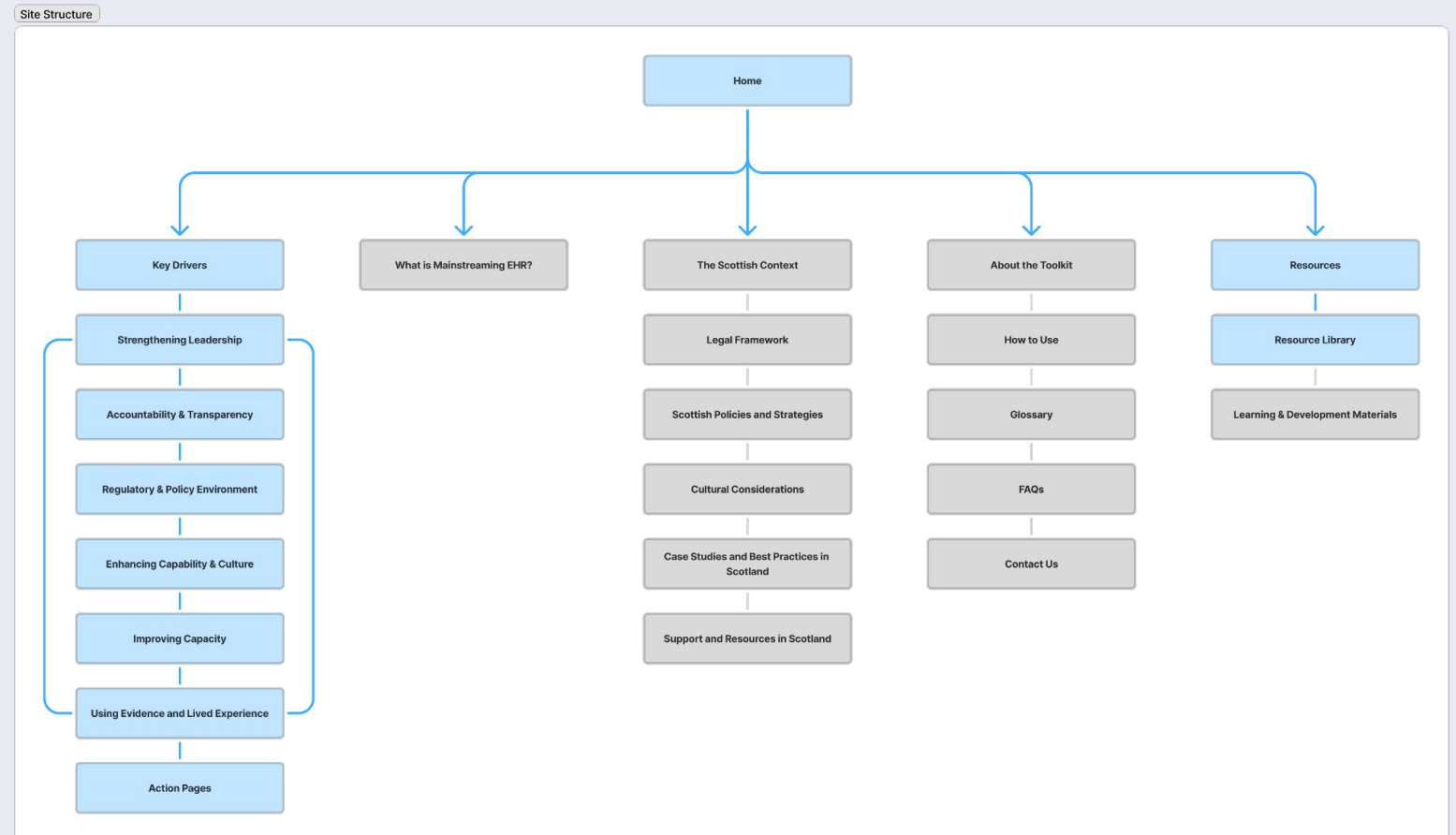
- **Content Flow**

- Users will be able to explore content in a free flow format.
- Key Drivers, Actions, and Resources will all act as a main components that influence the structure of the toolkit.
- These components will be built in such a way to easily link content using category/taxonomy relationships.

- **Self Assessment**

- An alternate option to navigate content is available for users in the format of a self-assessment tool.
- At a very top-level, users will answer a series of questions that will filter Actions (grouped by Key Driver) based on areas for improvement.
- This may also include recommended resources that support the filtered Actions.

[Click here](#) to view in full.



# Hosting & maintenance



# Hosting and maintenance

As part of the proposal, a three-year hosting and maintenance agreement has been agreed to cover post-launch support.

The detail of this is as follows:

- **Hosting**

- 1x Premium Cloudways Server (2 GB)
- 1x Domain Purchase/Renewal
- Let's Encrypt SSL Certificate

- **Maintenance**

- CMS/Plugin Updates (Monthly)
- Uptime Monitoring
- Premium WAF Firewall
- Premium Performance Cache
- Premium Image Compression
- Weekly Backup to Amazon S3
- 3 Months of Backups Retained
- Allocation for up to £200/y in additional plugins (e.g. WooCommerce addons)

- **Support**

Service error/bug fixing including, but not limited to:

- Server configuration/management tasks
- Site health checks
- Dealing with service outages
- Restoring backups
- Fixing SSL errors
- Resolving database connection errors
- Setting server security configs
- FTP account management (where agreed/possible)

# Hosting and maintenance continued

The maintenance agreement does not cover content changes, or maintaining resources to ensure they are kept up to date.

As part of the launch process, Kaleidoscope will deliver a content management training session for key team members of the Scottish Government who will be responsible for managing the content post launch.

Kaleidoscope will of course be on hand to support in content management queries in the early stages of launch, and will be happy to deliver refresh training sessions for new team members, or at a later point in the three year agreement if team members require it.

# Timing & milestones



# Timing and milestones

Scottish Government are developing content over a 6-month period of collaboration with key stakeholders and partners. This will mean finalised content for the full website will not be ready until September/ October of 2025, when the website was originally due to be launched and Kaleidoscope transition into a hosting and maintenance only agreement.

Because of this, it was agreed during the early kick off stage of the project that we would run the project in an agile and iterative way. Ensuring that the design and build of the website was completed by October inline with the invoicing and timing agreement from the proposal, but that the steps and phases between that would be shaped as the project progresses to ensure we are meeting required deadlines, whilst working to the material and information available at that time.

With that in mind, the following timeline is an indication of the phases and associated delivery time - allowing for the detail within those to be scoped at the completion of the previous phase.

# Delivery - timescales

	March	April	May	June	July	August	Sept
WEBSITE							
<b>Scope</b> - agreement of scope, provision of project initiation document	✓						
<b>Explore</b> - agreement of site architecture and toolkit page design		✓	✓	✓			
<b>Create</b> - build toolkit, test with stakeholders, launch site on provision of content					✓	✓	✓

The above timeline is high level in line with the agreed agile approach, please see previous page for more detail.

# Glossary of terms





# Glossary of terms

## Child pages

*Subpages that exist under a parent page in a website's page hierarchy.*

## Taxonomies

*Classification systems (like categories or tags) used to group related content in a CMS.*

## Blocks

*Modular content elements (e.g., text, images) used to build pages visually in modern editors.*

## Gutenberg blocks

*Content blocks specifically used in WordPress's Gutenberg editor to create rich page layouts.*

## ACF options page

*Custom admin pages created using Advanced Custom Fields to manage global site settings.*

## Forminator

*A WordPress plugin for creating custom forms, polls, and quizzes with a drag-and-drop builder.*





# Thank you

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