CLACKAMAS COUNTY BOARD OF COUNTY COMMISSIONERS

Study Session Worksheet

Presentation Date: 3/11/14   **Approx. Start Time:** 1:30 p.m.   **Approx. Length:** 30 min.

Presentation Title: County Website Re-Iraginination Review

Department: Public and Government Affairs and Technology Services

Presenters: Gary Schmidt, PGA, Dave Cummings, TS and Jen Modarelli, White Horse Productions

WHAT ACTION ARE YOU REQUESTING FROM THE BOARD?
Today is a presentation of the final report of the County website re-imagination. Does the Board have direction regarding implementation of the website Internet Re-Imagination recommendations?

EXECUTIVE SUMMARY:
In August 2013, following direction provided by the Board of Commissioners and the County's Budget Committee, Public and Government Affairs and Technology Services collaborated on a project to "re-imagine" the County's website and online presence. That process is now complete and the final report is attached.

Those recommendations include:
- Establish a dedicated web editor position to develop and implement newly-established web content policy, and governance.
- Create a web governance and content management policy and develop a web advisory committee drawn from PGA, TS and County Administration to provide guidance, develop best practices procedures and policies and assure compliance with web governance standards.
- Implement initial web design changes to assure efficient and user-friendly website navigation and establish procedures for continued web design enhancement and communication.

After concluding a competitive request for proposal process, White Horse Productions Inc. was chosen to lead the project which included a review of internal and external customer needs, interviews with internal stakeholders and external focus groups to identify and adoption of user-based analysis to recommend changes to web design and content delivery.

FINANCIAL IMPLICATIONS (current year and ongoing):
The total cost of the consultant contract is $47,000. This was budgeted in the 2013/2014 fiscal year budget.

LEGAL/POLICY REQUIREMENTS:
N/A

PUBLIC/GOVERNMENTAL PARTICIPATION:
Public and Government Affairs and Technology Services are working collaboratively to develop and implement the findings and adopt policies and procedures and to integrate feedback from internal and external web users and the public to achieve greater functionality and a more user-friendly website to serve the public need.

OPTIONS:
1. Provide feedback and input for further evaluation and consideration.
2. Accept the recommendations and direct staff to proceed through the 2014-15 budget process to implement recommended changes.
3. Do not implement the recommendations and continue with the present policy and procedures for web content and governance.

RECOMMENDATION:
Staff recommends the Board accept option 2: Accept the recommendations and direct staff to proceed through the 2014-15 budget process to implement recommended changes.

ATTACHMENTS:
The final report is attached.

SUBMITTED BY:
Division Director/Head Approval _____
Department Director/Head Approval ___s/Gary Schmidt___
County Administrator Approval _____

For information on this issue or copies of attachments, please contact Gary Schmidt @ 503-742-5908

Clackamas County Website Re-Imagination 2013

Final Report

March, 2014

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Agenda

- Project Goals

- Our Research

- Key Recommendations
  - Organizational Structure
  - Key Site Features
  - Site Architecture Recommendations

- Next Steps - Roadmap for Development
  - New Proposed Roles

- Re-Imagination Toolkit
  - Best Practice – Writing for the Web
  - Personas
  - Feature Matrix
  - Social Media Strategy
  - Accessibility Strategy
  - Web Governance

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Project Goals

- Review internal and external customer needs to identify how the website can best serve the them.

- Identify recommended policies and procedures for long-term content management.

- Establish a stable platform for innovative web and outreach tools encompassing recommendations for direction, protocols, tools and methodologies to enhance public outreach.

- Achieve efficient and user-friendly website navigation

- Develop a proposed list of best practices and design for effective delivery of content and services to a diverse customer base including development of policies and protocols to maintain appropriate content and efficient information delivery.

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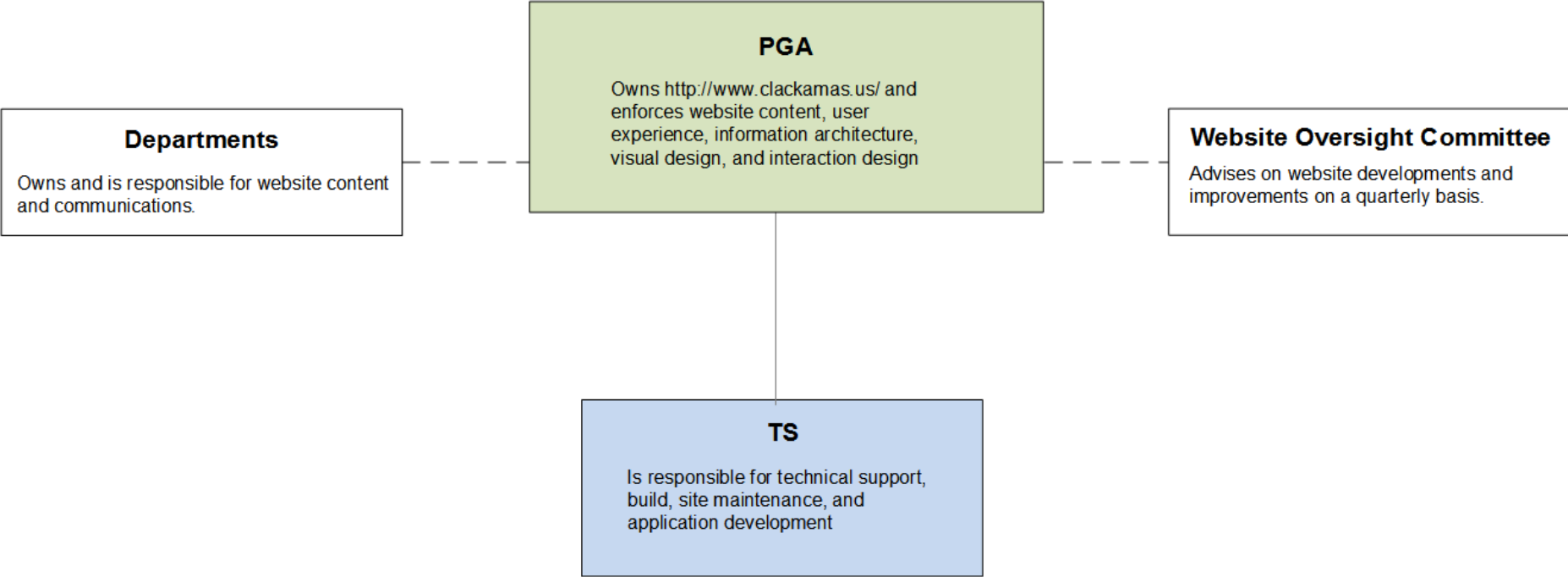# Project Goals

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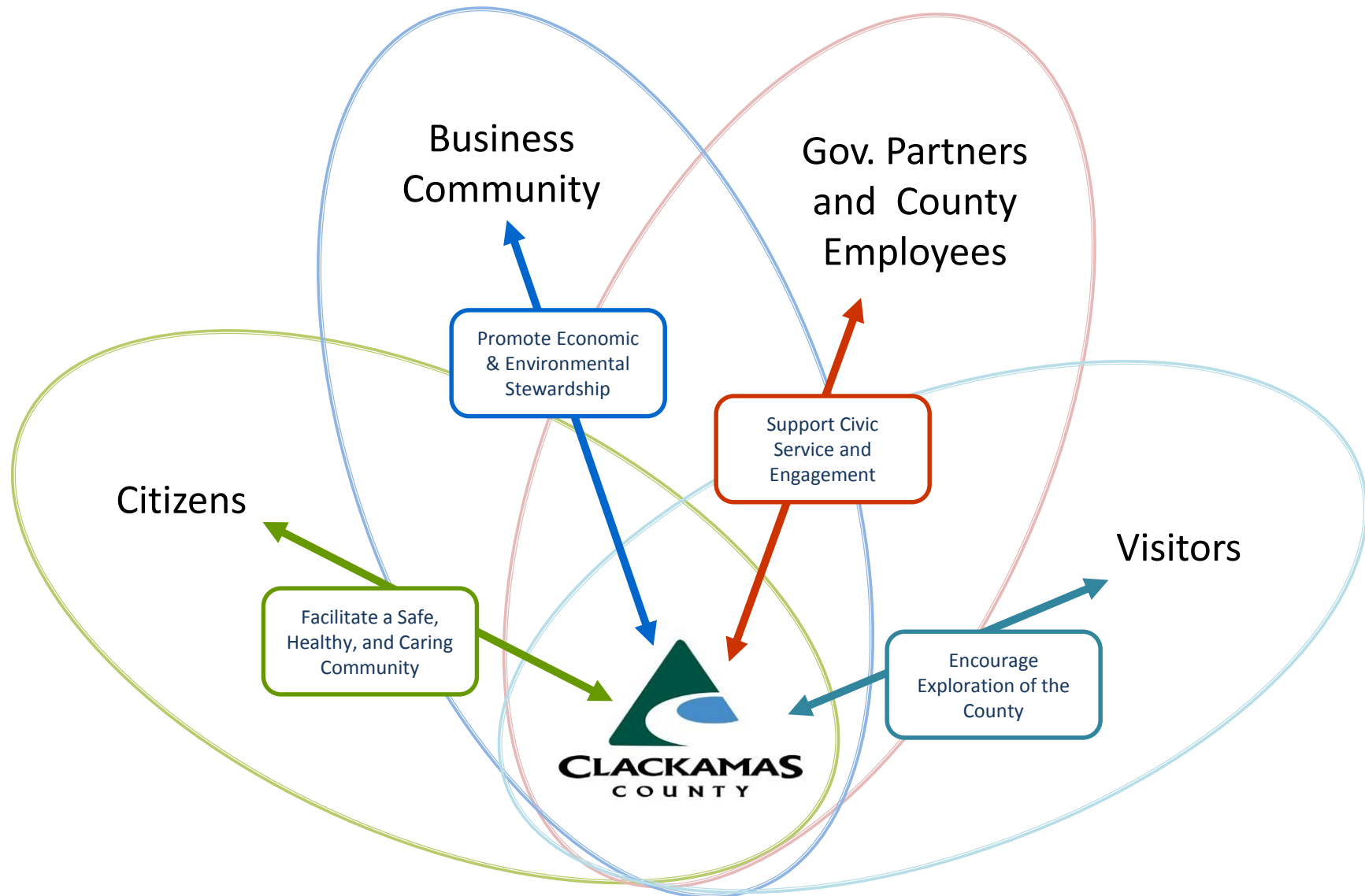
Our Research

- Six (6) Onsite Stakeholder Interviews

  30 minutes – guided conversation

- Two (2) CMS User Interviews

  Process Observation (Contextual Inquiry)

- Three (3) Onsite Employee Focus Groups

  2 hour group exercise and guided conversation

- One (1) Citizen Focus Group

  2 hour group exercise and guided conversation

- One (1) Online Public Survey for English

  184 responses

- One (1) Online Public Survey for Spanish

  4 responses

- Technical Review Meeting

- Competitive Benchmark of Three (3) Sites

  Oregon City – OR, Orange County – CA, Austin – TX

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Our Recommendations
Organizational Structure

PGA

Owns http://www.clackamas.us/ and enforces website content, user experience, information architecture, visual design, and interaction design

Departments

Owns and is responsible for website content and communications.

Website Oversight Committee

Advises on website developments and improvements on a quarterly basis.

TS

Is responsible for technical support, build, site maintenance, and application development

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Our Recommendations
## Key Site Features

1. Consistent primary site navigation organizing content by Department, Service, and Location.

2. Global utility navigation with links to the County Directory, Alerts and Messages, and Site Search

3. Global umbrella navigation placed on all sites and pages. This provides quick access to top level county content from anywhere.

4. Global footer treatment for all site pages.

5. Centralized county news and events.

6. Discoverable links to top level information, such as; reporting, RFPs, contact information, location information, employment, events, news, and assistance.

7. Use GovDelivery for email subscriptions.

8. Searchable content.

9. Mobile optimization.

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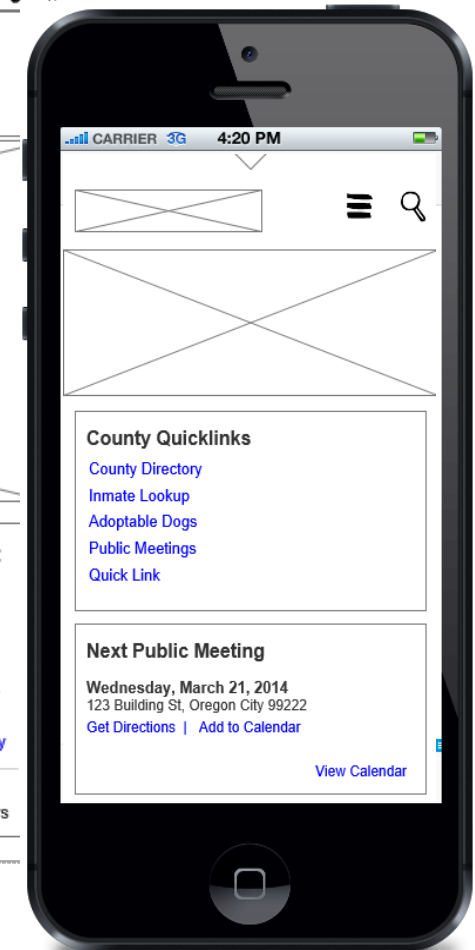PRODUCTIONS

Our Recommendations

Sample - Site Architecture

Umbrella navigation on all county sites and pages

Persistent utility links to; County Directory, Alerts and Messages, and Search
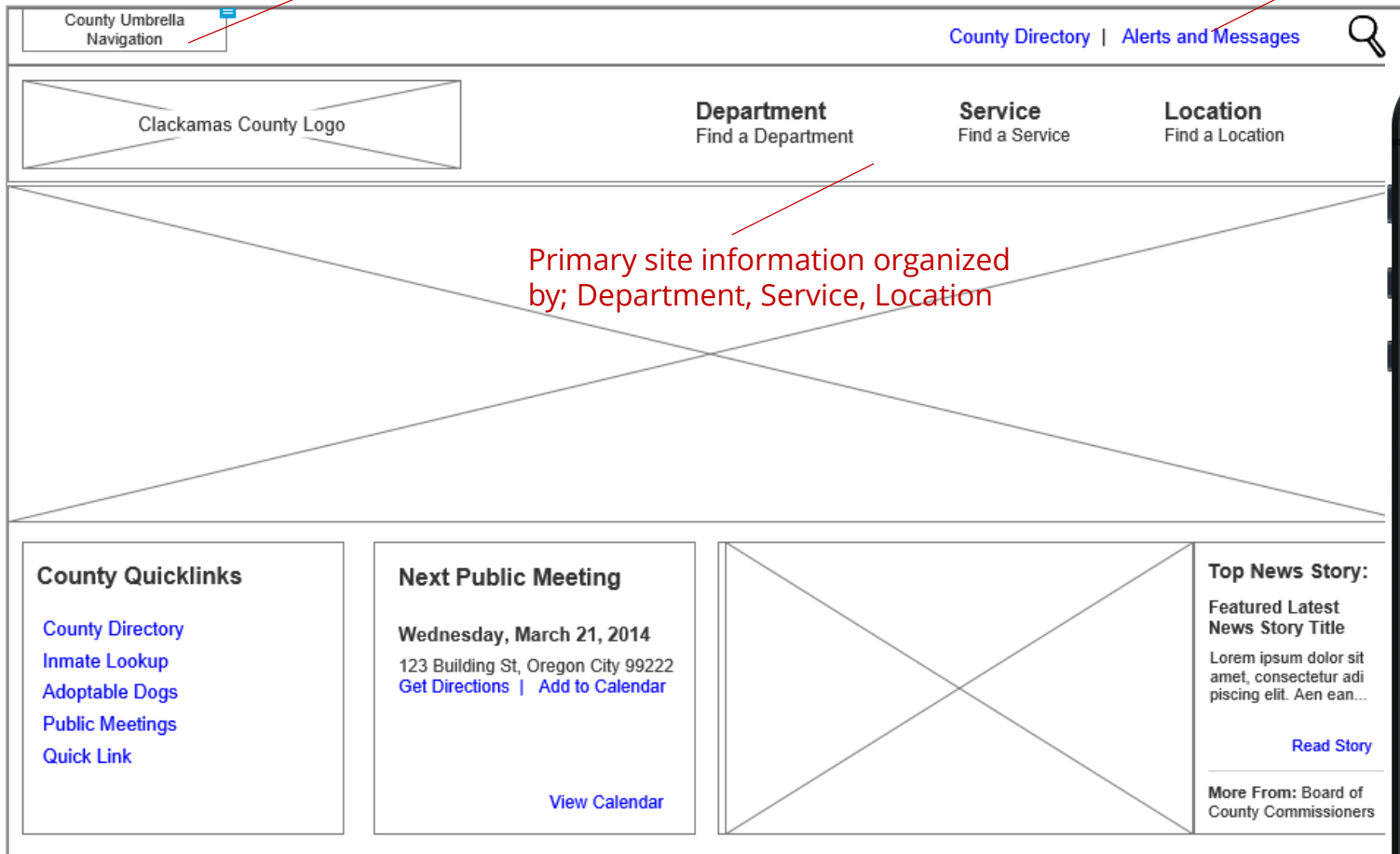
Primary site information organized by; Department, Service, Location

View Prototype

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Our Recommendations

Sample - Site Architecture

Seen when a user clicks the Umbrella Navigation – Displays quick links based on popular topics or high traffic pages, and a link to the county home page.

Explore Clackamas County   Take me to Clackamas County Homepage: **www.clackamas.us**

Departments   **Services**   **Location**   **Quick Links**

Depatment Link   Service Link   Location Link   Quick Link
Department Link   Service Link   Location Link   Quick Link
Department Link   Service Link   Location Link   Quick Link
Department Link   Service Link   Location Link   Quick Link

County Umbrella Navigation   County Directory | Alerts and Messages

Controls the Umbrella Navigation

Clackamas County Logo   **Department**   **Service**   **Location**
                               Find a Department   Find a Service   Find a Location

[View Prototype](#)

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Next Steps – Roadmap for Development

Redesign county site:

- Conduct a thorough content inventory of existing site and content
- Construct a new site architecture, including sitemap and navigation structure
- Create accessible, mobile-first page layouts and design for the main county site
- Use GovDelivery to provide email updates for your audience, and incorporate in appropriate places within the website
- Provide ways to incorporate department sites, including cross-navigation, alerts & emergencies, where applicable
- Work in conjunction with technical advisors for advice with development, including accessibility strategy, search, and CMS deployment

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Next Steps – Roadmap for Development

Ongoing governance:

- Form a Web Advisory Committee and hire a Web Editor/Content Coordinator

- Develop policy surrounding governance, including workflow, accessibility, web content best practices, navigation and other Information Architecture (ongoing)

- Deploy a robust analytics tool, like Google Analytics, to help track user behavior and engagement on your sites

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Web Advisory Committee

Proposed – New county role

- Meets quarterly, composed of representatives of various departments and administration, to advise on web policy and governance of the county websites

- Hears updates from and provides feedback for the Web Editor/Content Coordinator

- Helps with diplomacy for department relations and county-related dotted line web presence

- Members could include representatives from:
    - PGA / Communications
    - Administration
    - TS

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Web Editor/ Content Coordinator
Proposed – New county role (under PGA)

- Drafts governance policy and ensures it is interpreted correctly

- Works under direction of PGA but on behalf of all departments, including TS, and the county's audience to help ensure site adequately serves needs

- Day-to-day responsibilities include:

  - **Accessibility** – individual is well-versed in web accessibility standards, works with TS and others to draft a county accessibility strategy and guidelines, and helps ensure they are enacted

  - **Content Management** – ensuring departments meet best practices for web writing and formatting, that all content meets standards

  - **Content Entry and Formatting** – for the general county and those departments who may need support, this role can provide assistance loading or updating content

  - **Training** – helping ensure content managers understand content and governance standards, and how to use the CMS

  - **User Experience and Design** – works with departments, TS and/or vendors to ensure new sites, applications, pages, etc., meet county standards and best practices

  - **Analytics** – will oversee county site analytics, providing regular reports on user behavior, as well as recommendations for improvement

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Re-Imagination Toolkit
Best Practices – Writing for the Web

- Edit content ruthlessly to surface information of key importance to your users
- Use search term keywords within the first 100 words of copy to help your audience find your content
- Break up copy into chunks, use bullet points, accordions, tabs, dividers, and other tools to help make the page easy to read
- Cross-link content to other, relevant content where ever possible
- Format social content in as easy-to-read format as possible, removing big spaces and links from the post area
- Re-use your content across channels

[View Writing for the Web document](#)
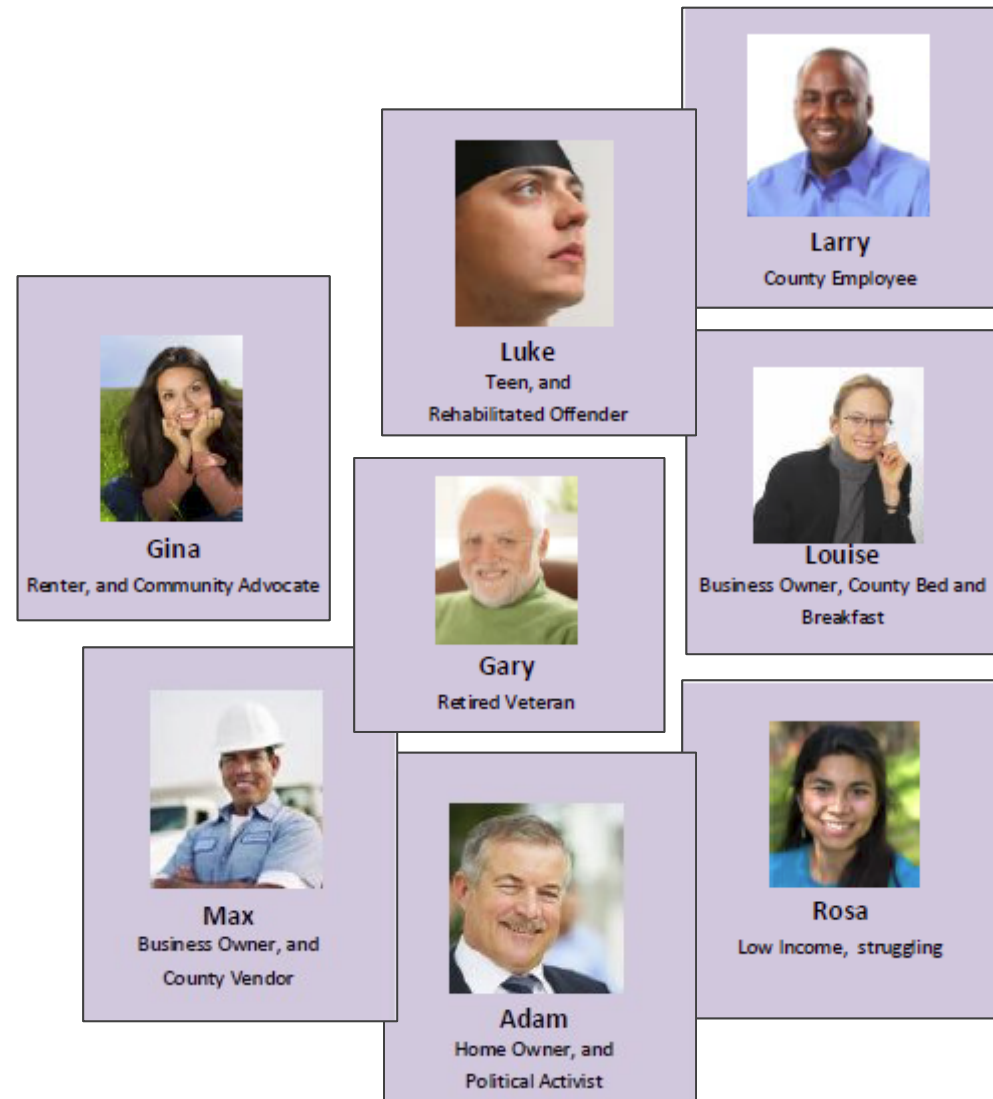
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Re-Imagination Toolkit
Your Personas

We've distilled our research findings down to a limited number of representative personas (user profiles) that serve to inform the site s architecture, design, and content development efforts. Personas help to keep real people in mind who need to use the site as a tool. For example; county residents, people who do business in and with the county, and visitors and others interested in information about the county.

Personas show

- The major task paths associated with a specific persona
- Pain points to be solved in design and development
- Demographic and background information for personas
- Emotions during tasks

[View Personas Document](#)

Larry
County Employee

Luke
Teen, and
Rehabilitated Offender

Louise
Business Owner, County Bed and
Breakfast

Gina
Renter, and Community Advocate

Gary
Retired Veteran

Max
Business Owner, and
County Vendor

Adam
Home Owner, and
Political Activist

Rosa
Low Income, struggling

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Re-Imagination Toolkit
Feature Matrix

The feature matrix articulates, organizes and prioritizes site features based on business requirements, user needs and technical difficulty, resulting in a comprehensive listing of all desired features correlated to business goals.

[View Feature Matrix Document](#)

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Rating Overview | *1 represents low value and 5 represents high value:* **User Value:** The feature's value to web users. **Strategic/Business Value:** The feature's strategic or business value to company. |
Where 1 difficult and 5 is easy: **Technical Effort** The rating representing the implementation effort in terms of ease or intensity. | **Weighted Total:** Total score for the feature. *Lower scores indicate more difficulty delivering value.*

Line #	New	Enhancements	Migration	Feature	Strategic Purpose	Notes	Technical Notes	Phase	User Value	Strategic/ Business Value	Technical Effort	Weighted Total
				Top Level: Portal								
1				**Global Site Structure**								
2	x			**Home Page**	Reinforce the overarching brand of Clackamas County, and establish a sense of place for the web site visitor.	All county site home pages should reflect the brand of Clackamas County, identifying it clearly as a county department or service. The home page for individual sites should not replicate the Clackamas County portal site but include the global high level site architecture and brand elements to help a user establish their location within the large ecosystem of county departments and services.		1	5			5
3	x			**Consistent Site Navigation**	Assist a user in navigating the county websites by providing consistent and expected content architecture on all sites. For example: department based, location based, and service (task) based.	**Department Based Content Architecture:** List of all county departments in the navigation for those knowing what department they need.		1	5			5
4	x					**Location Based Content Architecture:** Based upon current or specific location, one robust "smart" interactive map with the ability to look up everything in the county, such as parks, events, county departments, property and tax information.	Suggestion: 3rd party mapping system with county-inputted information overlay	1	5			5
5	x					**Service Based Content Architecture:** "How do I" - Assist a user in completing common user tasks by providing clear service information, and surfacing all resources and content in one location.		1	5			5
6	x			**Global - Utility Navigation**	Establish site architecture consistency with utility navigation for all county sites.	The utility navigation should be consistent throughout all county sites and include, at a minimum, links to: contact information, umbrella brand/navigation, search, alerts and emergencies		1	5			5
7	x			**Gloabal - Footer Navigation**	Provide common footer elements to establish consistency and set user expectations throughout all county sites.	The footer navigation should be consistent throughout all county sites and include, at a minimum, links to: contact information, County RFPs, reporting, county job openings, ADA information, privacy information, sitemap, and copyright information.		1	5			5
8	x			**Site Search**	Provide site search, helping a user get to the desired content quickly	Search will return results with the ability to sort/filter by webpages and documents.	Suggestion: Lucene (open-source) search of all content (not tag-based)	1	5			5

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Re-Imagination Toolkit
Social Media Strategy

- Consider engagement strategies, such as:
    - Hashtag campaigns for non-emergency incident reporting and praise for county and community assets
    - Orchestration, including links from site to social and social to specifically-referenced content on site
    - Use images and content about county operations and other "behind the scenes" information to show audience how the county is working for the community
- Use good social format hygiene, including:
    - Ensure posts are easy to read
    - Resize logos to fit spaces provided
- Consistent branding
    - Provide a consistent experience across all channels by using the same header graphic for all social channels representing the same entity (eg, overall county, specific department or program)
    - Departments can use their own logo for profile image, but should include county logo somewhere in header

[View Social Media Overview Document](#) – High-Level Overview

[View Social Media Best Practices Document](#) – Long Report

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Re-Imagination Toolkit
Accessibility Strategy

- Adhering to web accessibility guidelines is good practice
    - Allows disabled users to access all your content using screen readers or by enlarging text
    - Provides good user experience for all site visitors
- Employ best practices in both development and content, including:
    - Good navigability and searchability
    - Sequential content hierarchy on page
    - "Skip to Content" links to skip repetitive content
    - Alt tags behind images
- Require training for developers and content managers
    - Learn tips and strategies for development to meet accessibility guidelines
    - Helps navigate complexity of requirements
    - Help your departments understand why accessibility is critical
    - Learn best practices for content accessibility
- Use online tools to periodically check your site's accessibility

[View Web Accessibility and Technical Standards Document](#)

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Re-Imagination Toolkit
Web Governance

This document helps defines the roles and responsibilities of the individuals involved with the management and updating of the Clackamas County websites. The recommended governance structure separates content updates from presentation issues or service changes and clearly outlines roles and responsibilities for managing the website going forward.

A clear, task-driven workflow built into the CMS routes content updates for approvals and reviews and ensures that content is appropriate and approved before publication. Also, it will improve the ability to deliver accurate usable information and services to the public and to maintain consistency in the way the county web presence is created and managed.

[View Governance Document](#)

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Questions?

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