Website Analysis Guidelines

ThinkTank Initiative

IDS Institute of Development Studies

PRACTICAL ACTION Consulting

Document Details

Title   Website Analysis Guidelines

Author: Nason Bimbe
                 Information Systems Manager – BLDS

                 Siobhan Duvigneau
                 Information Literacy Manager - BLDS

                 Institute of Development Studies
                 Library Road
                 Brighton
                 BN1 8TU

                 T: +44 (0) 1273 606261
                 F: +44 (0) 1273 621202
                 DD: +44 (0) 1273 915794 / 1273 915796
                 Mob: +44 (0) 7808 794527 / 7738 43624
                 E: n.bimbe@ids.ac.uk / s.duvigneau@ids.ac.uk

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Introduction

Purpose

The purpose of this document is to provide a comprehensive overview of a framework for undertaking a website redesign or creating a new website. It is based on 5 stages adapted from the 'Investment planning and evaluation review' developed by the Department of Treasury and Finance in Australia. Although the framework was written for a different context, the stages are informative and useful in other disciplines.

This document is aimed at technical staff with support from the communication team. The concepts included in this guide range from the highly technical to intermediate design concepts. Therefore, we strongly advise you to work with a technical specialist when completing the tasks.

Finally, we acknowledge that some sections may not be relevant to you, and that you may decide not to complete the activities. This decision is left up to the organisation although we kindly request that you read the section before reaching this decision.

Guide Structure

The guide is organized into five stages, each stage contains several sections. At the end of each section you will find an activity. The activities are designed to help you learn more about the technology, protocols or practices covered in each stage, and the structure will enable you to re/design your website.

We anticipate that you will need some support before completing the activities, therefore we will contact you shortly to discuss an appropriate schedule for engaging with the IDS Technical Team. Look out for an email from your regional coordinator to discuss your availability.

There are two types of activity – compulsory and optional. However, as previously mentioned, you may decide to skip some activities if it is not relevant to your organisation.

Setting the Stage

As in any project, having a well understood framework to work from will be very helpful and beneficial to the overall project planning, execution and outcome monitoring and evaluation of a website development and use.

In this guide, we have followed a 5 stage process as defined in the Australian Department of Treasury and Finance in their Investment Lifecycle and High Value/High Risk Guidelines[1]. These guidelines have been adapted to fit with a website development project. The 5 stages are Conceptualise; Prove; Procure; Implement; and Realise. These are well depicted in the diagram below:

1 Conceptualise	**2** Prove	**3** Procure	**4** Implement	**5** Realise
Establish a clear need, define likely benefits and explore strategic interventions	Explore project options and estimate costs to validate value for money and viability	Finalise procurement plan, specify requirements, engage the market and award contract	Implement solution and transition to normal business	Measure the success of the investment
◢ Confirm the need	◢ Recommend an investment	◢ Award a contract	◢ Deliver the solution	◢ Deliver the benefits

Stage 1: Conceptualise

Stage 1: Conceptualise provides structure for the initial examination of problems on the basis of their policy and strategic merit. This stage assists with the development of a strategic assessment or preliminary business case.

Stage 2: Prove

Stage 2: Prove builds on information developed in stage 1 to provide a detailed evaluation of the shortlisted solution options and recommend a solution for funding and implementation. This stage assists with the development of a full business case.

Stage 3: Procure

Stage 3: Procure finalises procurement plans, specifies tender requirements, engages the market and awards a contract.

Stage 4: Implement

Stage 4: Implement focuses on implementing the chosen solution and transitioning to business as usual.

Stage 5: Realise

Stage 5: Realise focuses on measuring the success of the investment.

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[1] http://www.dtf.vic.gov.au/Investment-Planning-and-Evaluation/Understanding-investment-planning-and-review/What-are-the-investment-lifecycle-and-high-value-high-risk-guidelines

In the case of your website review we have adapted the stages as follows: -

1. **Conceptualise** – this is where in the case of a website, we identify the website's purpose, mission, objectives, budgets available, etc. It is a strategic needs analysis.
2. **Prove** – Here we tend to make sure that we have carried out a requirements analysis and identified all the options that we will need to assess. For each option an analysis of the cost benefit of each option is considered. In short we are looking at the viability of the website that we need to create, update or re-engineer.
3. **Procure** – We make sure we have the right and validated requirements that would inform the development of a contract that could be awarded to a service provider.
4. **Implement** – In this stage the website is designed, built, tested and rolled out together with other supporting material such as user guides and other web/digital channels such as social media.
5. **Realise** – There is also need to answer the question 'are the benefits being delivered by the new or re-engineered website?' Answering this question is done in this stage, and the key activity is monitoring and evaluation (M&E).

This guide discusses some of the important activities that need to take place in each stage highlighting the inputs and outputs as well as methodologies where appropriate.

1.0   Conceptualisation

Conceptualise

Establish a clear need, define likely benefits and explore strategic interventions

▲ *Confirm the need*

In the conceptualization phase, the Think Tank needs to make the case for re-engineering or developing a new website. This stage includes:

- Identifying the website's purpose
- The vision / mission (how will the website link to organisational goals?)
- Objectives (what will the website functions be?)
- Budget (what resources are available? i.e. Technical, human, financial, consumables)
- Audience (who is the target audience?)

All of these questions will inform your strategic needs analysis and help you to develop a business case or strategic plan.

A critical input to this process is the overall Think Tank's mission and vision statements. These may have already been articulated in your institutional strategy, however if there are gaps then you may need to create a mission / vision statement for the website development project. The process of creating the Think Tank's mission and vision was covered in the strategic communications workshop, in Kathmandu, and will not be captured in this document. Therefore refer to the workshop materials to review how to articulate your PEC goals, to guide the development of your website goals.

ACTIVITY #1

1. Locate your institutional strategy and the PEC strategy.

Once you have located these documents you can analyse them to achieve the next step, which includes creating the website's purpose, objectives and of course goals (i.e. mission statement). Monitoring and Evaluation (M&E) strategy of the website should also be created and agreed on at this stage (i.e. what are the things you will measure?). The outputs from this exercise should be clear statements of what the website should achieve, what these achievements will look like and how they are going to be measured. Among the documentation, there should be a clear roadmap of what functionality or features the website will provide, when they should be provided and how much they will cost. Often organisations may change the strategy but procedures for managing the website will stay the same. So it is important to consider when you will manage updates to the website and at what point in the year, in addition to how the website will be kept current in terms of content and take advantage of emerging technologies. All of these questions should be considered and documented.

As in everything we do, there is a cost in terms of time and money. A budget should be identified and set aside for the purpose of the website and it could be the case that the Think Tank may opt to go for a phased implementation (changes introduced over a period of time) of the features depending on the prioritization that the Think Tank has taken. This approach comes in handy if a clear roadmap for the website has been created.

ACTIVITY #2

1. Use the institutional strategy and the PEC strategy to create your website goals, which should be articulated as a mission and vision statement.

   Tip: Refer back to the PEC ingredients for a strategic goal

2. What type of approach are you adopting? Are you reengineering your website (i.e. introducing changes to an existing website) or are you creating a new website?
3. Who is your audience, and how will the website provide the information they need?
4. What technologies are you able and willing to take advantage of at this stage?
5. How will you maintain the website, and when will you undertake reviews?
6. Who is responsible for maintaining the website? Consider this in terms of content and technical maintenance?

2.0 Proving

Prove

Explore project options and estimate costs to validate value for money and viability

▲ Recommend an investment

In order to create a website that works for the Think Tank's audiences and also provides information they need, you will require a good understanding of your target audience(s) and understand how they currently find information within your website. The way the information is organized within the website is critical if you want your audience to 'see' or easily locate the content your website provides. Knowing their current behaviours, and skills (i.e. ability to use web-based tools) is therefore very important.

2.1 Understanding your target audiences

Usually carrying out this task requires an understanding of how your audience visits your site, assuming you have an existing site, otherwise you have to carry out a stakeholder mapping/analysis to identify what type of users you want to attract to your site.

The key points to note while carrying out this activity are: -

- Gather information (**feedback)** about your visitors in order to understand why they visit the website, what information they are looking for, how regularly do they visit and what features do they use (i.e. video content, publications, social media, events etc).
- What is your current audience's **profile**? Are they professionals, students etc. Try to capture information that describes them as a professional and also include details about their personal habits. (see the user persona below)
- Use **focus groups** to gain insights and detailed feedback on your website. Explore why certain web elements or features are used more than others, are popular (or not), or are missing etc.
- Also solicit feedback from your peers. For instance, conduct **telephone interviews** with your peers who have a similar website. These discussions will help you understand how they are solving the problems you are trying to tackle on the website.
- Collect examples of different **websites that you like or use** to identify the design, web features (e.g. video), and content ideas (e.g. opinion pieces, news, policy analysis etc).
- Create **audience personas** after identifying the website's key audiences.
- Make sure to put all the above into a report and design brief (see http://www.cleardesignuk.com/design-brief.html). This can be used by a potential agency/web designer/developer who will be contracted to carry out the implementation.
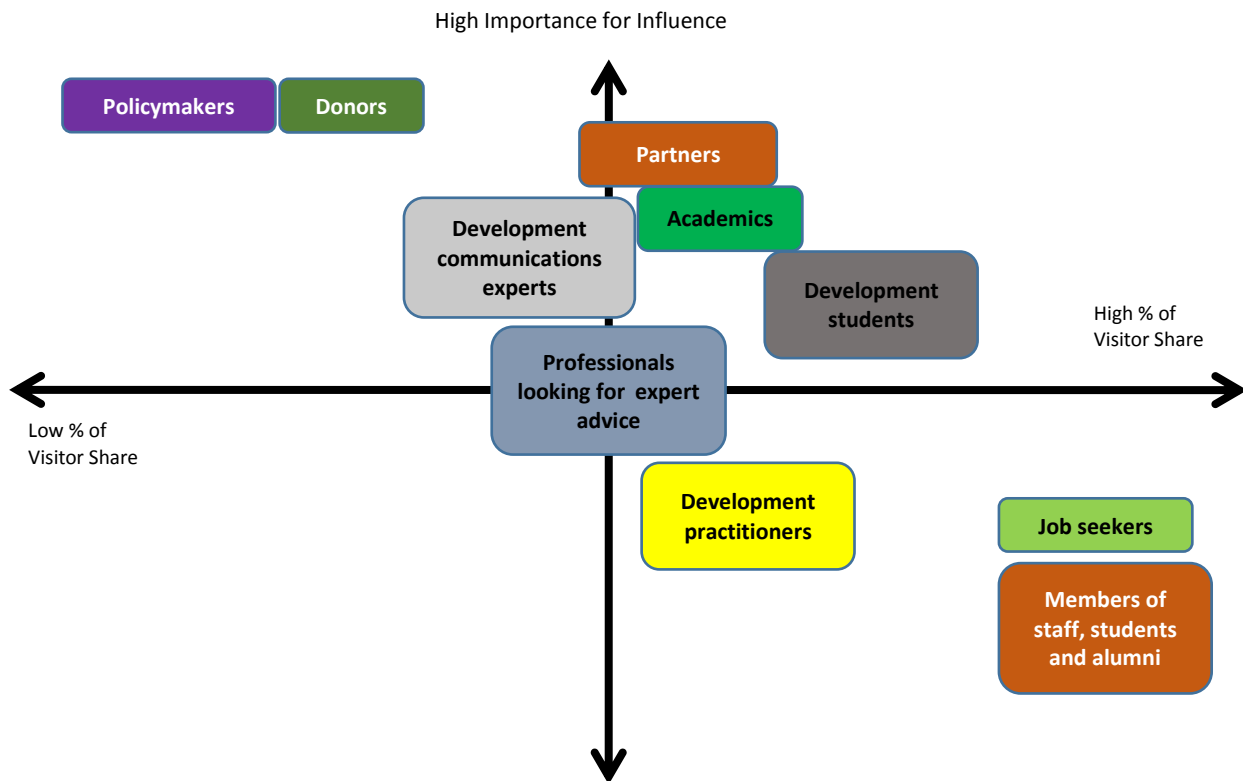
> In marketing and user-centred design, **persona**s are fictional characters created to represent the different user types within a targeted demographic, attitude and/or behaviour set that might use a site, brand or product in a similar way.
>
> A user persona is a representation of the goals and behaviour of a hypothesized group of users. In most cases, personas are synthesized from data collected from interviews with users. They are captured in 1–2 page descriptions that include behaviour patterns, goals, skills, attitudes, and environment, with a few fictional personal details to make the persona a realistic character.
>
> Source: http://en.wikipedia.org/wiki/Persona_(user_experience)

Using the above, we can for example identify our key audiences using a 'Visitor Importance Perspective' chart shown below. This example is an adaptation of a chart based on IDS and shows our teaching provision.

High Importance for Influence

Policymakers **Donors**

Partners

Academics

Development communications experts

Development students

High % of Visitor Share

Professionals looking for expert advice

Low % of Visitor Share

Development practitioners

Job seekers

Members of staff, students and alumni

Visitor importance perspective chart: sample taken from IDS website redesign process

ACTIVITY #3

1. Identify the audience types that use your current website, and also include future target audiences
2. Group the audience types by their level of influence (from High to Low)
3. Assess the target audiences 'frequency of visits' from information gathered from surveys, or web analytics. Also use this data to project the potential use of 'new target audience's visits to your website'. Assign a 'low' or 'high' % of visitor share
4. Finally, plot the audience types by 'level of influence' and 'frequency of visits' on the a 'Visitor Importance Perspective' chart

Think Tank Initiative: Policy Engagement and Communication Program

User Personas used in the IDS website redesign process

Here are **some example user personas** created after an audience identification session:

Name: Polly Seamaker

Policymakers

Statement of need
*"I want to s*tay abreast of issues and understand policy implications. I need to find trustworthy, evidence based recommendations, applicable to local context, options, comparison to other context/opinion"

Short narrative describing the persona:
Works for UNFCCC, is a member of the delegation team, Bangladesh civil servant, married with 2 children (very busy at work, and at home)

Skills and experience
- Low capacity to do research, not engaged with social networking in a professional role
- Good IT skills
- Uses news feeds to keep up-to-date

User's Key goals/tasks
- Quickly identify recommendations & policy implications
- Locate experts to consult
- 'cut and paste' relevant information
- Key task is to summarise the summary in their own words
- Highlight key points, develop options, translate into a local context
- To find out who the organisation is, and whether they are reputable institute
- Produce products that can keep a decision maker up to date
- Wants to keep up to date on a particular issue
- Understand the context but not too much

The website will:
- Make policy briefings, in particular the recommendations, available and 'easy to find'
- CVs, and contact details will be available for researchers
- Make the text easier to copy and paste, use simple language
- Present research undertaken in a particular country, categorise content (e.g. by country, region or theme)
- What does your Institution do?
- Provide a newsletter, and sign up for a newsletter page
- Produce a summary document, page or text on particular issues

Name: Henry Makoma

Development communications experts

Statement of need
"I need facts and research as background for a story I'm working on and need an expert to interview on issues. I need soundbites."

Short narrative describing the persona:
A freelance journalist or stringer based in Nairobi working for both Southern/Northern media in health and community

Skills and experience
- Web savvy using a range of social media (not just those popular in West)

- Contact with local organisations

- Can use range of multimedia – expects this type of media

User's key goals/tasks
- I need to write a credible story that will inform others

- I need results quickly because I work to deadlines

- I need to be directed straight to the relevant information

- I need information in non-specialist language

- I need to find quotable sources

The website will provide:
- The website will have good editorial processes, well-structured categorised content

- Good search with categorisation, and RSS feeds

- Consider personalisation if regulations allow, and it won't affect the usability of the site

- Ensure editorial staff are trained in research synthesis

- Provide News stories

Name: Professor Boffin	Academics	Development students

Statement of need
"I want to find rigorous, wide-ranging, historical academic research on topic of interest to bolster own research using tried and trusted ways"

Short narrative describing the persona:
Middle-aged, mid-late career, Southern-based research academic. Traditional in approach but with an open mind to look at other sources but academic research is the knowledge that counts. He's busy? Impatient?

Skills and experience
- Two-fingered typist, not a technophobe but not a technophile either
- Curious about new ways to access research
- Happier to discuss issues face-to-face or by email rather than in the open
- Prefer familiarity

User's key goals/tasks
1. Find out who and what Institution does, whether they are a trusted authority (credible/academic)
2. What support can your Institution give e.g. Resources library
    1. Sign-up for library newsletter
    2. Comment on blog
3. To find lots of research from a range of academic sources e.g. Grey literature, peer reviewed journals and published research papers e.g. Go to the Bookshop
4. Find out who has similar interests or is working on similar research topics

What Academics are not doing:
- Visiting one area of the website but looking at others
- Not signing up for RSS feeds

The website will provide:

- Who is at your Institution? About us page includes credentials and affiliations
- Provide details of services and products
- Sign-up to email newsletter feature
- Provide a feature for capturing comments (either a link to social media or on page comment system)
- Browse by Subject feature
- Buy a publication feature
- Contact a researcher feature
- Attend an event feature
- Make all of the departments easier to navigate and understand

Name: Peter Partner

Partners

Statement of need
"How can we get maximum benefit from our relationship with [your Institution]? Are there opportunities we are missing?"

Background:
Director of research at the Very Important Southern Research Organisation which also does interesting communication and learning things

Skills and experience
- Has basic web user skills
- Good use of mobile services
- Some bandwidth problems
- Strong knowledge of research in their field

Users key goals/tasks
- What **work** is your Institution currently doing which overlaps with my interests? E.g. I need updating on research outputs, projects, other activities
- Who are the key **people** to work with at [your Institution] for us? How can we develop/improve our relationship?
- Is [your Institution] giving us a sufficiently high **profile** status / visibility on its website, in its online or offline events?
- How can we better use our relationship with [your Institution] to get **funding**? (Which funders does your Institution have leverage with?)
- What joint activities would appeal to your Institution?

Your website provide:
- 'Look for a project' feature
- 'Find a researcher' who has experience in x subject, region etc. feature
- Provide staff contact details, and short description of services / roles (e.g. job title)
- Provide details of the funders of our projects
- Show 'Partner' organisation(s) we work with, and provide details of the work
- On researcher pages, include details of research interests
- Provide details of areas we would like to work in

Name: *Hermione Griffiths*

Donors

Statement of need
"I want to monitor those research institutes that we've funded for."

Background:
Working at the Gates Foundation running a multi-million dollar grant scheme funding research into HIV prevention in Sub-Saharan African states.

Skills and experience
- Social Networking
- Immersed in government bureaucracy
- Has some research background
- Conducts literature reviews

Key goals/tasks
- Monitor the progress of research projects I have funded
- I want to see a track record of past, current and in progress publications to inform my decision about a funding application
- Help me write reports on key development topics for my line manager
- I want to access institutional data and annual reports on potential grant holders
- I need to quickly identify which individuals understand peer review or could sit on an academic committee
- I want to identify southern partner organisations working on a particular subject in a given country
- I need to monitor publications directly attributed to the research funded by my institution and other donors

Your website tasks
- Provide details of the current status of a project e.g. ongoing, completed
- Search publication and display as a list or download as file e.g. pdf, csv
- Provide information about current trends, what we're currently working on
- Make annual reports & accounts available / downloadable
- Include academic experience in staff profiles
- Ensure country experience and partner organisation profile
- In each project or publication include donor's name

ACTIVITY #4

1. Refer back to activity #3, pick a range from each audience type and create their User Personas. Use the structure provided in the examples above.

2.2 Content types and their relationships

This section describes the various 'content types' that we recommend for a Think Tank website. The ones mentioned in this section are the most important but there could be others that a Think-Tank may wish to implement or already have in their current offering.

Content Type is a term used to describe a piece of information that is found on a website and that can be stored, displayed, listed, and searched. Let's use a tangible example – let's pick a researcher in your institute. He/ She is a content-type called 'Person'. A content-type 'Person' will have attributes such as: title, name, qualifications, thematic areas of expertise, publications, geographical areas of expertise etc.
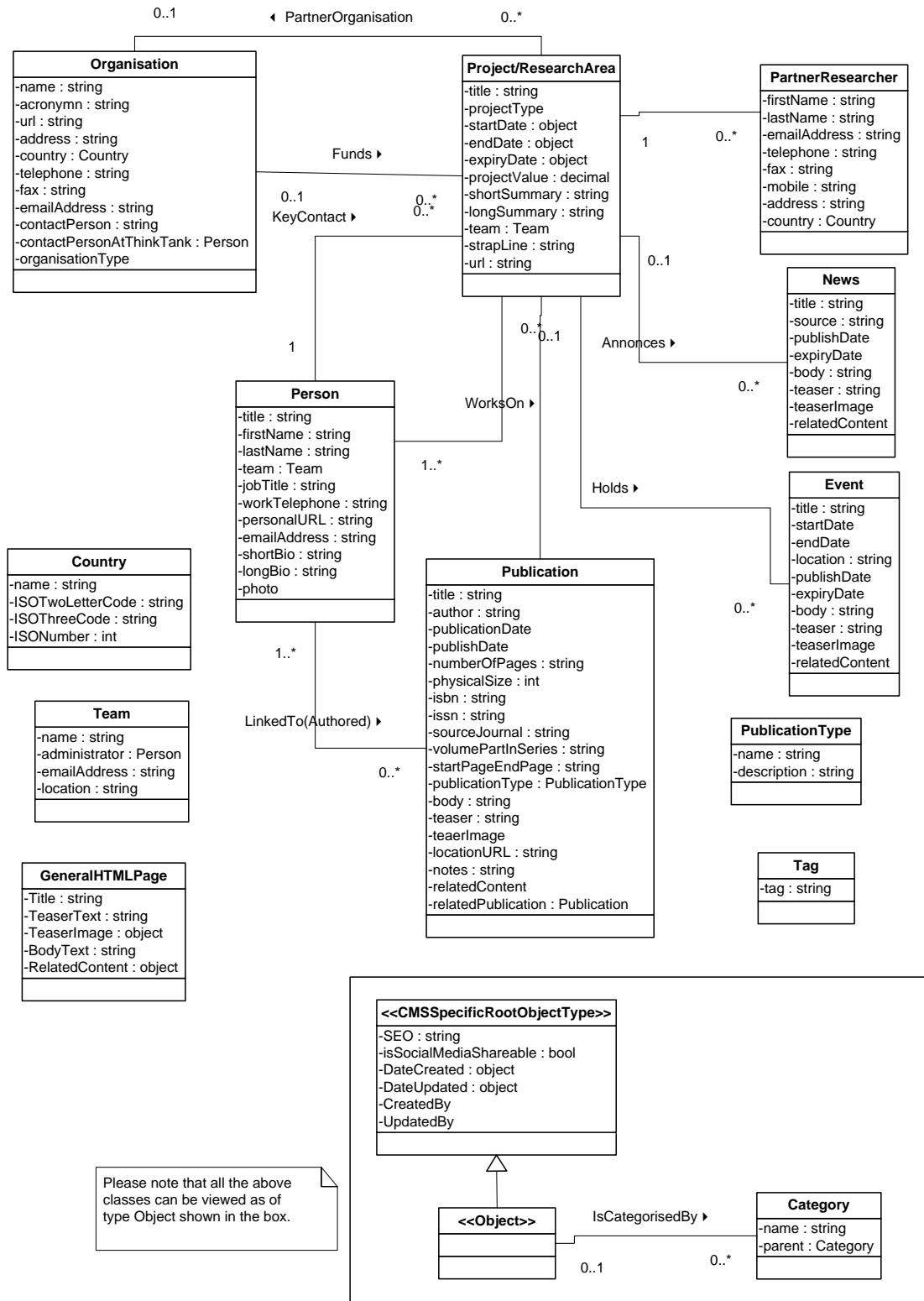
So, the term 'type' in this case can be thought of as an 'entity' as described in software engineering language. An 'instance' of the content-type can be a named single person (e.g. Rajeesh Sharma), a place (e.g. University of Sussex) or an object (e.g. bookshelf). This data can be stored and described. It has relationships with other content types. These relationships can be very powerful as they can aid the navigability of content within the website. For example if a user looks at a single publication, they can (if the relationships are well defined) discover all the other publications written by the author of the first publication encountered by the user. They can also be useful in creating opportunities to display other related content such as 'the people who bought this book, also bought these books'. Can you think of others? Take a look at Amazon (www.amazon.com) and look for relationships between a book and other content types e.g. reviews

The following is a list of the content types that we think will provide website users with information about your products, services and people. The diagram below shows how these content types could be linked to create meaningful relationships.

A Think Tank Typical Data Model: To be used in website implementation

0..1   ◄ PartnerOrganisation   0..*

Organisation
- -name : string
- -acronymn : string
- -url : string
- -address : string
- -country : Country
- -telephone : string
- -fax : string
- -emailAddress : string
- -contactPerson : string
- -contactPersonAtThinkTank : Person
- -organisationType

Project/ResearchArea
- -title : string
- -projectType
- -startDate : object
- -endDate : object
- -expiryDate : object
- -projectValue : decimal
- -shortSummary : string
- -longSummary : string
- -team : Team
- -strapLine : string
- -url : string

PartnerResearcher
- -firstName : string
- -lastName : string
- -emailAddress : string
- -telephone : string
- -fax : string
- -mobile : string
- -address : string
- -country : Country

Funds ▶

KeyContact ▶   0..1   0..* / 0..*

1   0..*

0..1

News
- -title : string
- -source : string
- -publishDate
- -expiryDate
- -body : string
- -teaser : string
- -teaserImage
- -relatedContent

Annonces ▶   0..*

0..1 / 0..1

WorksOn ▶

1

Person
- -title : string
- -firstName : string
- -lastName : string
- -team : Team
- -jobTitle : string
- -workTelephone : string
- -personalURL : string
- -emailAddress : string
- -shortBio : string
- -longBio : string
- -photo

1..*

Country
- -name : string
- -ISOTwoLetterCode : string
- -ISOThreeCode : string
- -ISONumber : int

Holds ▶

Event
- -title : string
- -startDate
- -endDate
- -location : string
- -publishDate
- -expiryDate
- -body : string
- -teaser : string
- -teaserImage
- -relatedContent

0..*

Publication
- -title : string
- -author : string
- -publicationDate
- -publishDate
- -numberOfPages : string
- -physicalSize : int
- -isbn : string
- -issn : string
- -sourceJournal : string
- -volumePartInSeries : string
- -startPageEndPage : string
- -publicationType : PublicationType
- -body : string
- -teaser : string
- -teaerImage
- -locationURL : string
- -notes : string
- -relatedContent
- -relatedPublication : Publication

1..*

Team
- -name : string
- -administrator : Person
- -emailAddress : string
- -location : string

LinkedTo(Authored) ▶   0..*

PublicationType
- -name : string
- -description : string

Tag
- -tag : string

GeneralHTMLPage
- -Title : string
- -TeaserText : string
- -TeaserImage : object
- -BodyText : string
- -RelatedContent : object

<<CMSSpecificRootObjectType>>
- -SEO : string
- -isSocialMediaShareable : bool
- -DateCreated : object
- -DateUpdated : object
- -CreatedBy
- -UpdatedBy

Please note that all the above classes can be viewed as of type Object shown in the box.

<<Object>>

IsCategorisedBy ▶

Category
- -name : string
- -parent : Category

0..1   0..*

When you look at the diagram you will see lots of content-types and relationships. The content-types are shown in the boxes and contain a list of possible attributes. The relationships between these content types are shown by linking lines, and some have a label defining the type of relationship. An explanation of the diagram is as follows:

- **Publication** – this is a key content type for an organisation (such as a Think Tank) that carries out research, and produces a physical output (i.e. a publication). This content-type can also describe outputs that are produced by other authors and not necessarily from your institution. Some of the key attributes of this content type are:

    - title
    - author/s
    - publication date
    - abstract

    These attributes are known as the publication's metadata. A full text version of the publication (such as a PDF document) could be added to the content-type however, the metadata for the full-text would normally be shown as the file location of the full text document. For example: the attribute 'locationURL' would contain a link to the full text document on your website file system, on another website or a digital library.

- **Person** – Having this content type is essential if you want to capture rich data about a particular person. For example: a researcher is an 'author' of one or many publications. The key attributes would normally be:
    - First name
    - Last name
    - Job title
    - Contact details

- **News** – Every organisation needs to tell its audience about its new products and services, and generally want it is doing. This requirement is best served by having a dedicated 'News' content type. Attributes for a 'News' content type are:
    - Title
    - Date published
    - Expiry date
    - Body (of content)

- **Event** – An event is an activity that an organisation organizes and carries out. Attributes associated with an 'Event' content type include:
    - Title
    - Start date
    - End date
    - Body (of content)
    - Location

- **Research Area or Project** – It is usually the case that a Think Tank undertakes its work within the confines of a discrete objective which is hereby termed as a 'Project'. Projects will have people working in it both within the Think Tank and outside of the

institution. Research Publications may also be produced as part of the output/s from the project. The attributes of a Project (or Research Area) include:
- o Title
- o Start date
- o End date
- o Project value (i.e. cost)
- o Description
- o Funder

- **Organisation** – A Think Tank will obviously be associated with other organisations whether they are funders or other collaborators. So, you may want to store information about these organisations. Attributes that can be stored include:
  - o Name
  - o Address
  - o Contact details
  - o Description (of organisation)
  - o Contact person

- **Team** – Most Think Tanks are structurally organized around the specialist tasks, and units called departments. The use of the term 'Team' is used deliberately in a website structure to denote those units that undertake research, and therefore produce publications. The typical attributes for this content type are:
  - o Name
  - o Contact person
  - o Contact details
  - o Description (of the team)

- **Partner Researcher** – A 'partner researcher' is a researcher who is not directly employed by the Think Tank but may be working on a specific project within the Think Tank. Attributes include:
  - o First name
  - o Last name
  - o Contact details
  - o Qualifications

- **Theme or Category** – Content categorization is very important from an organizational and access point of view because it enables you to cluster information by theme, subject or regional groupings. This content type can also help define some relationships that cannot be explicitly defined in the data model (see Diagram page 16). The attributes associated with this content type are:
  - o Name
  - o Parent (if they are hierarchically organized e.g. Nutrition (Parent), Child nutrition (Child)

Categorisation is similar to tagging, and you should consider using tags as well as categories / themes to cluster content. The difference between Categories and Tags is that Categories are controlled, in other words you predefine the categories before

they are used, however tags are defined by the user. You can also define tags as a way of adding additional information to the content.

- **'HTML'** page type – this is a general content type that can be used to describe content that does not fall within the specialized content types described above. It is like a wild-card. So, for example if you have text that describes your organisation, which could be presented on the website as an 'About us' page then you can use this content type. The attributes of this content type would include:
  - o Title
  - o Body (content of the page)

How to create a data model

When reengineering or building a new website, you should need to undertake a **data analysis of the different content types on the website.** You can start to create a data model using paper first, and then transfer this model into your preferred tool. The advantages of using paper is that you can move the content types around, and draw the lines to show relationships etc.

A data model must show the relationships between content types so that they a technician can implement the model using the chosen Content Management System (CMS) that would be used to host the website and other web channels such as social media. When doing this work, you should also consider other rich media types such as video or audio – this type of media can be bandwidth hungry but this should not be a deterrent as there are cloud services that can host them and also stream the content to the user without adding a heavy load on the server hosting your website.

Activity #5

1. Identify the content-types in your current or new website
2. For each content type identify the attributes
3. Then identify the relationships between content types
4. Create a prototype data model on paper

Optional

5. Refine your data model by using an appropriate data modelling tool, such as: Visio (http://office.microsoft.com/en-gb/visio/) , ArgoUML (http://argouml.tigris.org/). A list of tools is also available here: http://www.databaseanswers.org/modelling_tools.htm

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2.3 Website Design Principles

Now that we've designed the content structure of the proposed website, let's begin to consider the public view of your content structure. This is what individuals commonly consider as the 'website'.

A good website design should aim to make the website both **usable** and **pleasing** while at the same time **delivering information** and **building the brand** in a **technically sound** way, and in a **visually coherent** way. There is a lot of information about what constitutes a well-designed website on the internet, which can be widely consulted (see the links below). We have looked at a few[2] [3] which are very helpful and easy to understand. You are encouraged to look at them as a starting point to understand what may be needed in your current or new website.

In this document, as an illustration on good website design, we have used the *10 Key Website Design Principles* as described by Ben Acheson's blog post [4] which are well articulated and very easy to follow. These principles are summarised below: -

Content Comes First – *Don't put the cart before the horse.* Define your content before you decide how the website should look. This is has been explained in section 2.2 of this document.

Know Your Audience – *consider the needs and expectations of your visitor and appeal to those users in a more intuitive way*. Make sure you understand your audience and their needs, because understanding your audience enables you to develop content that is right for them. In order to understand your audience you need to ask questions such as: who is this piece of content for? How do we need to present this information to both appeal and make the content discoverable for our users?

Use Appropriate Media – *use the most appropriate and user-friendly media available to convey the information*. Consider whether the information is most effectively conveyed as text, video or both? What about infographics?

Be Intuitive – *A clear structure, visual cues and easily recognizable links help users to find the path to their goal (see User Personas – Key Goals)*. The website's navigation must be well positioned (i.e. structured on the page), labeled (i.e. descriptive text) and clear (see 'call to action' below). Please remember also, only allow a page to be visible to the public if it is complete otherwise users will not take you seriously and it may also damage your brand, especially if a user is taken to a blank page or a page with a message that says 'under construction'.

Don't Fear Whitespace – *Whitespace reduces cognitive overload and makes it easier to digest the information presented on the screen*. The term whitespace refers to empty space on a page and is used to give balance, proportion and contrast to a

[2] http://uxdesign.smashingmagazine.com/2008/01/31/10-principles-of-effective-web-design/
[3] http://psd.tutsplus.com/tutorials/designing-tutorials/9-essential-principles-for-good-web-design/
[4] http://www.digivate.com/blog/website-design/10-key-website-design-principles-infographic/

page. Whitespace can help a user to quickly scan content and decipher meaning without feeling overwhelmed with information.

Strive for Simplicity – *Users rarely visit a site just to enjoy the design, they are looking for information*. There is a tendency to overload the Home Page with a lot of information. Instead, break up the content into subpages and use the home page to display snippets of content combined with images or graphics, and link to the rest of the content relegated to the subpages.

Don't Reinvent the Wheel – *Standard design conventions reduce the need for your users to figure how your site works*. This is very important, for example always put the logo at the top left hand side and also the site-wide search must be visible in the header, which is usually located in the top right hand corner of the page.

Be Consistent – *Keep the layout and branding consistent between the pages of the website.* This is pretty clear, always maintain consistency in the 'look and feel' of the pages within the website.

Call to Action – *Guide and encourage users to perform useful actions on the website.* Always make sure that users are guided and encouraged to achieve what you want them to do (this is called a 'call to action'). For example, there is no point having a link to a full-text download if when the user clicks on the link there is no full text available, or they are presented with a 'pay wall'. If you expect your user to pay for information on your site, or log-in to see information, then you need to tell them before they take this action.

It important therefore that whoever will be tasked with redesigning the website is aware of the design principles, or that funds are available to hire a designer or software development agency. These design principles should form the basis of the Terms of Reference (TOR) for the design agency.

Activity #6

1. Evaluate your website based on the design principles described in this section.
2. Be critical, does website follow these design principles. Write a short review (100 words) based on each of the 10 principles identifying whether you meet this principle (or not) and why

Optional

3. Using the 10 principles and your critique, create a statement that explains how you want your website to improve. This would form part of the TOR for a design agency.

2.4 Content Discovery Mechanisms

The purpose of any website is to provide information to its intended audience and this information needs to be timely and of good quality to increase the awareness and credibility of your institution. We would like think that this is the objective of your organisation! It is important therefore that all the content you intend the public to see is easily found and accessible on the website.

The 'search feature' is a ubiquitous way of finding content. Having a single site-wide search is important, so the search technology must be robust and up to the task. The most known and widely used search technologies on a lot of websites today is the Apache SOLR[5], which is open source software. This software package is mostly bundled with mature Content Management Systems (see section 2.8) today. This search technology is capable of providing full text search, filtering (i.e. search facets such as Author or Subject), and the ability to rank content based on relevance for example.

As mentioned earlier in this document, the search box should be located in the site header, so it will be available on all the website pages.

Another way content discovery could be employed on the site is through the use of what is termed 'canned searches'. These are searches that are predefined by the editor using criteria to filter the content and render it as a list, for example, on the page. Another example using current technology is to present the content as an XML[6] or JSON[7] file. When a user lands on a page the website dynamically constructs the page with the results that are defined by the criteria in the canned search. This works very well if content is well categorized, and you don't have the time to add new content manually on every page. Once the content is added to the CMS, and meets the criteria of the canned search, it will be picked and presented to the user when they visit the page. Dynamic content saves you time, and keeps your website content current.

Another thing to consider making content discoverable is to provide information through subscription based information delivery services. For instance, users could be encouraged to subscribe to a newsletter on the website, or an RSS[8] feed so that content can be delivered directly to the user.

Activity #7

1. Familiarise yourself with Apache SOLR as an example of a search tool
2. Evaluate your search feature based on what you've learnt about search tools. Is your search feature adequate?
3. Learn about canned searches by looking at Eldis' resource guides. The content on these pages are generated by canned searches. Look at the 'Latest Documents' section over a period of a few days, and observe how the content changes.

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[5] http://lucene.apache.org/solr/
[6] http://en.wikipedia.org/wiki/XML
[7] http://en.wikipedia.org/wiki/JSON
[8] http://en.wikipedia.org/wiki/RSS

2.5 Search Engine Optimisation

Wikipedia[9] defines Search engine optimization (SEO) as the process of affecting the visibility of a website or a web page in a search engine's "natural" or un-paid ("organic") search results.

In general, the higher ranked a page in the search results the more frequently visitors are likely to visit the website. Usually SEO considers how search engines work, what people search for, the actual search terms or keywords typed into search engines and which search engines are preferred by their targeted audience. Optimizing a website may involve editing its content, HTML and associated coding to both increase its relevance to specific keywords and to remove barriers to the indexing activities of search engines.

One way to achieve this is by making sure Meta tags are generated for all pages on the website.

```
Meta tag definition: Meta tags provide a brief synopsis of your page
    content and builds on the description included in title tags.
```

Most Content Management System's provide facilities for entering the keywords for the Meta tags. The onus is therefore on the website editor to define and provide the keywords in the CMS. The CMS will add it to the page generated in the correct place.

Quality of the actual content on the page is also of paramount importance. Writing content for the web is different from writing content for print therefore demands different skillsets. **It is important that individuals responsible for creating content on the website are aware of best practice for writing on the web**. For instance, the 'body' content of a web page should have a generous sprinkling of two, three and four keyword chains. This is referred to as keyword density. As a guide, keywords should take up approximately 20% of your body content.

You may also opt to use sitemaps. Sitemaps are an easy way for you to inform search engines about pages on your website that are available for crawling. In its simplest form, a Sitemap is an XML file that lists URLs for a site along with additional metadata about each URL (when it was last updated, how often it usually changes, and how important it is, relative to other URLs in the site) so that search engines can more intelligently crawl the site. Web crawlers usually discover pages from links within the site and from other sites. Sitemaps supplement this data to allow crawlers that support Sitemaps to pick up all URLs in the Sitemap and learn about those URLs using the associated metadata. Using the Sitemap protocol does not guarantee that web pages are included in search engines, but provides hints for web crawlers to do a better job of crawling your site. Sitemaps created based on standards are offered under the terms of the Attribution-ShareAlike Creative Commons License and have wide adoption, including support from Google, Yahoo!, and Microsoft. More details can be found at http://www.sitemaps.org/ and for Google specific at https://www.google.com/webmasters/tools/home?hl=en.

There are several other factors that can be taken into account, to find out more about SEO tips refer to Google's Search Engine Optimisation starter guide: http://static.googleusercontent.com/media/www.google.co.uk/en/uk/webmasters/docs/search-engine-optimization-starter-guide.pdf

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[9] http://en.wikipedia.org/wiki/Search_engine_optimization

Finally, you can help search engines index your webpage by adding instructions in a robots.txt file. This is called a Robots Exclusion Protocol. To find out more about robots.txt files refer to this link: http://www.robotstxt.org/robotstxt.html

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Activity #8

1. Go to BBC news (http://www.bbc.co.uk/news/). Right-click on the page and select 'view source'. Look for the meta description tag (meta name="Description") and the meta property tag (meta property="rnews:description"). What are the keywords used? Pick a page from your website and evaluate how you are using these tags on your website?
2. Now, review the body content (i.e. the text on the web page), and write a list of keywords that could be used in the meta description or property tags to describe the page.
3. Using details from your current website (or if you do not have website use the publications objects derived from the data model shown in 2.2), create sitemap definitions of at least three publication content type instances.
4. Finally, analyse the robot.txt file for the BBC website. You will find it in the root of the website e.g. www.bbc.co.uk (root). So to find the robots file you type: http://www.bbc.co.uk/robots.txt
5. Find your robots.txt file by searching the root of your website: e.g. www.[name of website]/robots.txt. If you haven't got one then we recommend you create one. Speak to IDS technical services for more support, if necessary.
6. Notice that some areas of the website pages have been 'allowed' and 'disallowed' to indexed by the search engine. There are several ways to write a robots.txt file, but one of the most popular methods is to use negation. Therefore only those areas of the website that are 'disallowed' (or restricted) will be contained within the file. The search engine will index those areas of the website that do not appear in the robots.txt file.

   If we look at the BBC's robots.txt file we can see that they allow everything on their website to be indexed except the directories listed in the file:

   ```
   User-agent: Googlebot
   Disallow: /iplayer/episode/*?from=r*
   Disallow: /iplayer/cy/episode/*?from=r*
   Disallow: /iplayer/gd/episode/*?from=r*
   Sitemap: http://www.bbc.co.uk/news_sitemap.xml
   Sitemap: http://www.bbc.co.uk/video_sitemap.xml
   Sitemap: http://www.bbc.co.uk/sitemap.xml
   Disallow: /_programmes
   Disallow: /606/
   Disallow: /apps/cbbc
   Disallow: /apps/flash
   Disallow: /apps/ide
   ```

   This is an example of their current robots.txt file (Accessed 24 March, 2014)

7. Share your robots.txt file with the group.

2.6 Social Media Integration

User engagement with the content and brand are critical to the success of any organisation's website. This is where we are most likely to measure the 'outcome' of whatever we are doing to test whether people are engaged.

One way of testing engagement is to use social media such as Facebook, Twitter and other social media tools. Social media integration tools offer website owners the facilities to encourage usage, monitor activity and most importantly engage audiences through the discussion (for instance) of the content and brand. There are tools now available that make it easier for website owners to make their content 'integrated' with various social media platforms. Most notable among the services is AddThis[10]. This is a social bookmarking service that enables users to share your content.

Activity #9

1. Visit the Addthis website (www.addthis.com), or an equivalent social bookmarking, and find out about the service. Note: the basic service is free to users.
2. Make a note of two-three advantages to using this type of service
3. Discuss this within your communication's team, and decide whether it is a valuable tool for your website.
4. If so, plan to add the personalised widget to your website in the future.

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[10] http://www.addthis.com/

2.7 'Data Re-use' Mechanisms

Put simply 'data re-use' is a way for one system or service to utilize data from another
service in an automated way. There are various methods to allow the content of your
website to be consumed by other 'machines' in an automated way.

The most common one is using RSS[11] feeds. Make sure that you 'enable' content on your
website to be accessed via RSS feeds. An effective approach is to allow RSS generation on
specific pages where content changes frequently, such as a news listing page, or a latest
publications page.

Another method that is becoming increasingly popular, and probably the most robust
method that has arisen due to the proliferation of cloud services and mobile computing, is
RESTful[12] API[13]. This method requires an organization to make a substantial investment in
the building the skillsets required to develop the RESTful API. There are of course
specialized document management platforms that comes with them 'out of the box'.

Activity #10:

1. Go to the Onthinktanks website (http://onthinktanks.org/) and click on the RSS 🔊
   symbol.
2. What language is the RSS feed written in?
3. Visit the following page: http://www.w3schools.com/rss/ and compare Onthinktanks
   RSS page with the basic structure on this page. What do you notice?
4. Now, look at your own RSS feed. You might have one but is might not be strategically
   located i.e. for content that changes regularly. Review how you are using RSS feeds on
   your website.
5. If you don't have an RSS feed currently, plan to use this facility in the future

Optional:

API stands for application programming interface. It is a protocol that enables one website
to talk to another. To find out more read this article:
http://www.theguardian.com/media/pda/2007/dec/14/thenutshellabeginnersguide

6. Where would you find the API on a website? Take a look at Twitter or Facebook, where
   can you find information about their API?

---

[11] http://www.whatisrss.com/
[12] http://en.wikipedia.org/wiki/Representational_state_transfer
[13] http://en.wikipedia.org/wiki/Application_programming_interface

2.8 Technology Platform

There are different Content Management Platforms (CMS) that a Think Tank could opt to use to manage the website structure, content, and publishing rules. In order to understand what a CMS is it is necessary to first understand the concept of content. Content is in essence, any type or 'unit' of digital information which can be text, images, graphics, video, sound, documents, records etc. - or in other words - anything that is likely to be managed in an electronic format.

Content Management is effectively the management of the content described above, by combining rules, process and/or workflows in such a way that its electronic storage is deemed to be 'managed' rather than 'un-managed'. A 'managed' website is easier to manage and locate digital content.

Wordpress[14] is an open source CMS platform that is simple to use and is good for simple websites – i.e. those websites that don't have complex requirements. Wordpress has a mature community and a substantial number of extensions called Plugins that can be used to augment the core functionality with add-on / specialised functionality.

For complex websites there are more sophisticated open source software platforms that also have mature communities and a huge number of extensions (i.e. Plugins or modules). The common ones are Drupal[15] and Joomla[16]. Of late Django CMS [17] is also proving to be a viable possibility.

For all CMS' you need to consider the Theming. 'Theming' or 'Skinning' is a concept that is used to create the 'look and feel' of a website, so that it fits the organisation's brand, is easy to use. The look and feel of a website refers to the design aspects as well as the user experience of using the website.

Activity #11

1. Look at the following CMS: Wordpress, Joomla, Drupal and Django CMS. Identify the different facilities each platform each offers, and consider the level of skills needed to use them. Write a list of pros and cons for using each platform
2. Consider the 'community' (user as well as developer) and support systems for each of these platforms? Find a community online and identify how they engage, and assist each other.
3. Extensions and plug-in libraries – Look for these on the CMS' website. How comprehensive are their libraries, does the library contain the type of functionality you are looking for?

Optional

4. Find out more about the 'look and feel' of a website by visiting the following link: http://www.motive.co.nz/glossary/looknfeel.php
5. Compare this guidance with what you learnt in section 2.2 and 2.3. Consider how this improves your understanding of design and usability.

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[14] http://wordpress.org/
[15] https://drupal.org/
[16] http://www.joomla.org/
[17] https://www.django-cms.org/en/

2.9 Technology Platform Performance and Availability

To be effective in pushing an organisation's web presence and enhancing the brand, the website should be secure, perform reasonably well and must be available all the time. A slow website has the potential to alienate the users the organisation needs or wants to reach.

A good server specification and adequate bandwidth are two things to consider if you want to offer a robust user experience, business continuity and a stable website performance. If external hosting or cloud services are the way to go, you will still need to consider issues of bandwidth, availability and performance generally.

Activity #12

1. For this activity please use Google Chrome browser
2. Press the F12 button, to view the developer tool, make sure you have selected the network tab (see 2 in the diagram below)
3. Refresh your website page (by reloading the page for instance)
4. See how long it took for your website to load. In the diagram below the website (BBC News) took 142 milliseconds to load (see 2 below)
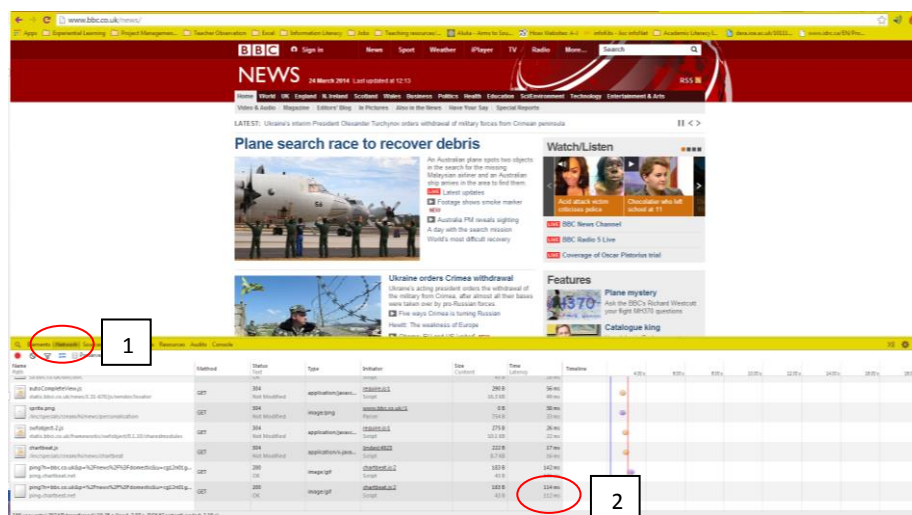
5. Now we need to assess the server capabilities to understand the implication of processor speeds, memory and disk capacity on performance. Ask your IT support managing your server for this information. The results will be discussed with the IDS Technical Pool.
6. You need to develop a business continuity plan, which includes backup and restore procedures. Refer to this guidance note for details of areas you need to consider: http://eval.symantec.com/mktginfo/enterprise/other_resources/b-10_tips_acheive_backup_recovery_success.en-us.pdf. This guide will help you ask the right questions, and inform your decisions.

2.10 Website Analytics

Google Analytics[18] should be used to provide insights about how the website is doing in terms of satisfying the intended users. You will want to include metrics for measuring the number downloads, number of visits, the location of page requests, and others.

To establish the number of downloads, use Google Analytics 'Event tracking' or 'server side GA injection' procedures. Server-side GA injection captures metrics for download data that are routed to a single download page on the website.

To find out more about how to use Google Analytics, visit the starter guide: http://www.google.com/analytics/learn/setupchecklist.html

For those of you who prefer personal blogs, you can start to learn about Google Analytics from this link: http://blog.kissmetrics.com/google-analytics-5/

Activity #13

1. The key to using Google Analytics is you will need a Google Account. You can use a Gmail account to register your website.
2. Once you've done this, you are able to access the console for Google Analytics. View the following link to install tracking code(s), set up goals and work with report data: http://www.google.com/analytics/learn/setupchecklist.html
3. You will need access to server, if you are not using a content management system (CMS) that provides the facility to enable use of Google Analytics
4. If you are using a CMS, you need to put the 'key' in the CMS. You will get this key when you register for Google Analytics
5. The following is a step by step guide for setting up Google Analytics: http://www.dkssystems.com/how-to-use-google-analytics-for-beginners

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[18] http://www.google.com/analytics/

3.0   Procurement

Procure

Finalise procurement plan, specify requirements, engage the market and award contract

◢ *Award a contract*

At this stage, all the objectives and goals of website have been defined, a budget may be set aside and the user analysis has been carried out including user journeys identified and the content types understood. You should have also documented how the website will 'look and feel'.

All of these details should be clearly documented in a document (e.g. a website strategy and specification document). This document will be used to create a design brief that could be used for procurement purposes, such as employing the services of a web designer and/or internal or external developer who will implement these plans. In short make sure that you have the right and validated requirements.

If you decide to outsource your website development, then you will need to tender for these services. This process will be influenced by the current procurement policies and procedures available in your organisation, by your funders or within your context. Usually, there is a need to identify at least three possible contractors to undertake the work. These contractors should be invited to prepare a proposal, and prior to selection you may ask them to deliver presentations and answer questions.

Each prospective contractor should provide a clear breakdown of costs, as well as a definition of the methodology and tools they use to create artifacts. Finally they must define how to communicate with you during the design and implementation processes.

The process of creating the website artifacts is highly iterative and collaborative in nature. Some of the tasks that will be carried out during the meetings are fact-finding tasks in order to identify what you mean by a 'modern website'. In order to define this goal they will need to understand the 'user journeys' through the website, identify the templates needed, the navigation structure, category trees and page layouts just to mention a few. Therefore do not be surprised if the contractor asks you a lot of questions!

Once you have made a decision about the contractor then you need to issue a contract and mandate for carrying out the design work. A single contractor could be hired to carry out the design and implementation work however, but in most cases these roles are taken on by different contractors. The contractor should create design mockups and feedback processes to account for changes during the iterative design process. The feedback processes will also make sure that the final product is agreed by both parties.

Activity #14

1. Establish the procurement procedures in your organisation. Familiarise yourself with these processes, who is the contact person?
2. If you are receiving funding, find out whether your funder has a preferred procurement process as well

    Tip: Make sure you build in time to find the right contractor, and establish how you will communicate right from the beginning!

4.0   Implementation

Implement

*Implement solution and transition to normal business*

Deliver the solution

Usually in website development there are three distinct implementation phases. The first three phases can be carried out simultaneously or sequentially, these are: (4.1) producing the designs; (2) transferring the designs into your chosen CMS as well as incorporating the various content types identified. The third stage (3) involves migrating existing content into the CMS, and/or creating new content. The final stage is (4) Website launch and promotion.

The first two phases involve processes that are highly iterative in nature and therefore well-defined feedback loops need to be devised and agreed by the Think Tank and the contractor/s. This is basically the stage where all or most of the aspects defined in the 'Proving Stage' (discussed in section 2) are implemented to form a tangible software application with user guides, standards and protocols.

4.1 Website Design

A classic design flow process is shown in the diagram below:
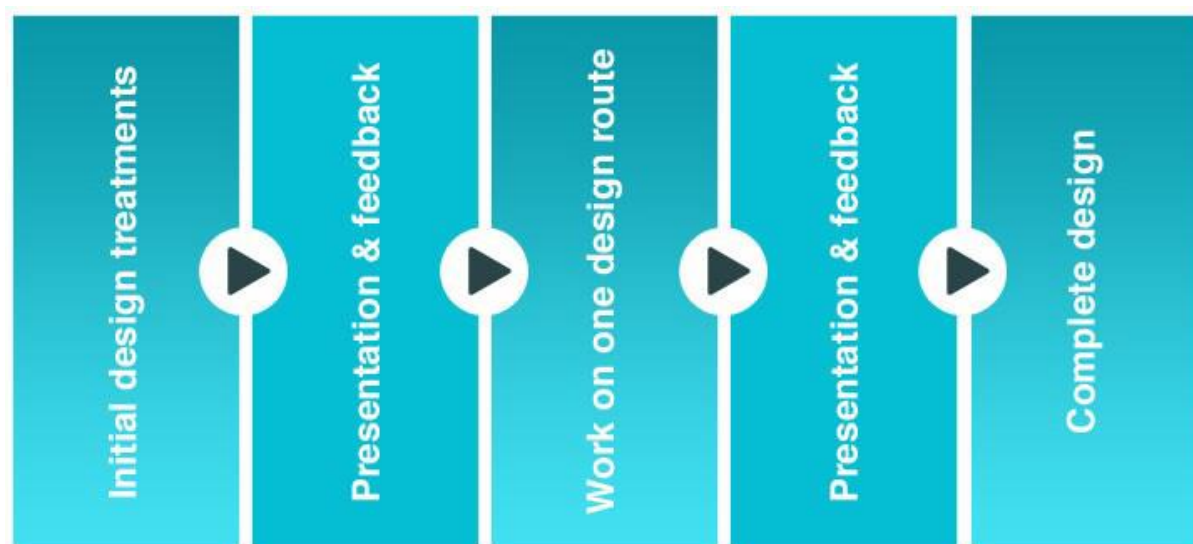
Note: the flow process is cyclical, and usually consists of five stages with a minimum of two formal presentations and feedback sessions. Informal feedback may be going on throughout the process but it is important to schedule a formal feedback session to establish and document progress to date.

The contractor must clearly explain the methodology they are going to follow when working on your project. A major output from the design process is a **set** of mock-ups. These will be transformed into design templates and then subsequently transformed into fully validated XHTML scripts.

During the website design process it would also be a good time to define and codify the website standards, house style and branding if these documents do not already exist, or need refreshing / updating. House styles and branding policies play a major role in helping staff identify the standard 'look and feel' of your organisation when they setup other web channels or produce print publications.

Training of your website editors needs to be carried during this phase, as well as user guidelines created and tested. There is need to create a place where these and other documentation (like FAQs) are stored and communicated to staff. This is very important for organisations that have a large editorial team, especially if they are located in different geographical locations. It is beyond the scope of this document to discuss in detail how to store and share information (i.e. 'internal knowledge management' system). You may already have a system, such as an intranet, or a shared drive on a server etc. We advise you to set up an internal knowledge management process.

4.2 Implementing Designs into the (desired) Content Management System

Once the designs are done and accepted by both parties (i.e. the organisation and contractor), you will need to have these designs incorporated into an appropriate Content Management System (CMS) that will power the website. The Think Tank will have already settled for a preferred technology platform depending on the requirements needed for the website. There are quite a diverse range of CMS platforms out there to choose from, a few have already been discussed in section 2.8 Technology Platform.

The implementing designs process can be carried out by an outside contractor. Incorporating the designs into the CMS is one part of the work, the other is the operationalising the content types and their relationships in the CMS, as well as the 'user journeys'.

The immediate output from this process, which is iterative, is a beta website. The beta website will then need to go through a systematic testing period to make sure that the objectives of website are met, and software bugs are identified and fixed.

4.3 Migration and/or creation of content

This stage in the process involves preparing current website content to migrate into the new content management system (CMS). If you are reviewing existing content you should revisit the keyword density on each page, as well as the page titles etc. Refer to section 2.5, Search Engine Optimisation. This step will also apply to new content.

Work with your contractor to write scripts to automatically migrate existing content into your new CMS. If this is a job you need the contractor to undertake then make sure you write this process into their contract.

4.4 Website Launch and Promotion

The beta website has been tested, software bugs resolved and fixed so it is now time to launch the website to the general public. There is substantial amount of time and resources needed to plan and co-ordinate the launch. Promoting the launch needs to be carried out with a comprehensive 'marketing' campaign, which is targeted at some of the stakeholders identified in section 2.1.

However, promotion should continue throughout the lifespan of a website. Use the insights gleaned from Google Analytics to design your marketing strategy and campaign(s).

This is also the right time for the organisation to start rolling out the changes to your branding in other web media, social media and print identities so that it is consistent with your website.

Activity #15

1. Create a marketing and promotion strategy for your website launch.
2. First read the following article: http://www.smartpassiveincome.com/how-to-launch-a-brand-new-website/
3. We have also included a document as a template to help guide the design of your strategy (see Appendix 1).
4. Share your strategy with the IDS Technical Team for review / feedback

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5.0   Realisation

Realise

Measure the success of the investment

▲ Deliver the benefits

The final step in the 5 stage process model used in this guide is to establish the benefits your website is delivering. This is more akin to an impact assessment, where you measure the impact of your investment.

The website at this stage is 'live' and serving the audiences identified in 2.1. The website now forms an integral part of the daily operations to communicate effectively about your organisation. There is a need to continuously monitor and evaluate whether you are achieving the goals that necessitated the creation or revamping of your website. Two types of metrics need to be collected, analysed and acted upon. These are known as actionable metrics and reporting metrics. Actionable metrics are those that will enable the organisation to fine tune the website setup and configurations so that the website continues to offer the objectives and goals in a sustainable and cost effective way. The reporting metrics help you to decipher whether the website is meeting the aims you set out to achieve.

There are various tools that an organization can use to collect, analyse and report on these metrics. Some of the collection methods have been discussed in section 2.10. However, you will have to use additional methodologies to augment this data. For instance, you may choose to undertake surveys and/ or hold interviews with your target audiences to collect the metrics that are needed to provide a comprehensive understanding and appreciation of the benefits delivered.

Activity #16

1. Refer to your marketing strategy, how do you intend to collect, analyse and report on metrics? How often will you do this, and who is responsible for this task? Finally, how will you make this information widely available, and for whom?

APPENDIX 1: EXAMPLE COMMUNICATIONS STRATEGY FOR THE RELAUCH OF IDS OPENDOCS WEBSITE

Note: the names of individuals have been removed.

Open Docs re-launch plan – Autumn 2013

Aim/Impact

We want to give Open Docs a big boost emphasising its usages and functionality. We hope these activities (and ongoing marketing) will maximise usage (and so increase impact of IDS research and the BLDS digital library.) We also hope promotion of Open Docs will improve perceptions of IDS as an innovative institution with a progressive approach to research communication, publications strategy and open access publishing.

Objectives/Outcomes

- Increased awareness of Open Docs within the IDS community with a measurable increase in submissions and establishment of collections.
- Increased promotion of Open Docs across our networks and partners' platforms.
- Increased visits to Open Docs from both academic and non-academic users.
- Measurably increase in visits and downloads from both the north and south.
- Strengthening of funding proposals where funders have Open Access mandates and policies.

Key Audiences

- ✓ Academics/researchers
- ✓ Librarians
- ✓ Development practitioners
- ✓ Policy officers (NGO/UN/Governmental)

Key Messages

1. As a key part of IDS' Open Access strategy our research and policy outputs including reports, papers, briefings, journal articles and book chapters are now routinely published onto our open access digital repository.
2. Open Docs hosts collections from our key research centres and research consortia as well as the BLDS Digital Library .....
3. Over the next few months IDS will place its entire 47 years' worth of academic research (xxxx titles) into the repository making this material available to all.
4. Open Docs significantly extends the reach of our and our partners' research and evidence, increasing the potential role of this knowledge in accelerating global development.
5. The IDS website will continue to be the first port of call for many users seeking our publications and other outputs. However, Open Docs will greatly increase our impact.

Techie bit:

Unlike normal websites Open Docs uses software that is international and interoperable, facilitating data exchange and re-use. The whole texts of documents are rapidly indexed by search engines and securely stored for the long term. In this way Open Docs working alongside

IDS' website is hugely increasing the discoverability of IDS research both inside and outside academic circles.

OpenDocs case study/example:

Last year IDS launched our new Strengthening Evidence Based Policy Programme funded by DFID. This cross institutional programme focuses on seven themes spanning energy, gender, impact evaluation, innovation, nutrition, rising powers, sexuality and rights and mitigating violence. Over the next three years the programme will provide policy solutions to emerging areas of development and over xx reports, policy briefings and other publications. Open Docs provides an ideal repository for these outputs as not only does it profile them in a series of thematic collections that are easily navigated but it ensures that the full text of each of the documents indexed by search engines and securely stored for the future. In practice this means that far more policy actors, for whom this programme was designed, will find and use this evidence. Already documents from the programmes' rapidly growing collections have been downloaded xx times from xx different countries.

Marketing/Comms Plan

Open Access Week

Monday 21st – Internal communications (BLDS top lead):

- Intranet home page
- IDS all email
- Competition

New messages: 1) now integrated workflow 2) looking for new collections

Wednesday 23rd

- Widget launched - used across IDS site, BLDS, partner sites and KS linking to Open Docs
  Action: [x] to commission from Library. Tech support [x media person]

- News story on IDS site - replicated on BLDS/KS etc
- Slider - IDS site
- IDS E Newsletter - main story
- Alumni Newsletter
- FB and Twitter updates – promote specific collections and BLDS library
- Dev Horizons blog or ILT blog Pitch to WonkComms??

Following weeks

- Bookmarks - distribution at upcoming conferences e.g. DSA
  Action: [x] to commission from library (other materials??)

- Research teams newsletters (x comms officers)
- Implement Open Docs labels on publications pages (x person)

Longer term

- Spring publications catalogue (x)
- Integrate into Publications marketing strategy (x)

M+E

Monitor Open Docs activity over Oct/Nov/Dec and produce report for senior managers before end of year

(*Named Person(s) assigned to task*)

Document End