

Report of the Special Committee on the IUP Website

July 14, 2004

BACKGROUND

At the direction of the President's Cabinet, Mr. Matthew Hughes, Interim Vice President for Institutional Advancement was asked to create a special committee on the University's web site. The charge to the committee was to review issues with IUP's current web site, consider developments in web design and management and make recommendations to guide the future direction of the IUP website. The committee's recommendations were to look at future direction, approaches, structures and strategies, not on an actual design for our site. The committee was asked to provide its report within 45 days – or in early July.

Membership was to include representatives from the Academic Computing Policy Advisory Committee, the Council of Deans and each Division. A TSC representative was added as an *ex officio* member to provide technical knowledge of the current site and systems. The members of the committee were:

- ACPAC –
 - Dr. Jonathan B. Smith, Health & Physical Education
 - Mr. Lloyd Onyett, Assistant Dean, College of Education and Educational Technology
- Council of Deans
 - Mr. Michael J. Hood, Dean, College of Fine Arts
- Division Representatives
 - Academic Affairs – Dr. Mark J. Piwinsky, Office of the Provost (Co-Chair)
 - Administration and Finance – Mr. N. David Strong, Information Support
 - Institutional Advancement – Mrs. Regan P. Houser, Communications (Co-Chair)
 - Student Affairs – Mr. Mark E. Anthony, Career Services
- Technology Services Center
 - Ms. Joanne G. Kuta, User Services

ISSUES TO CONSIDER

As the first step in its work, the committee sought to identify the common issues and concerns about the current web site. The following questions were studied.

1. What is the image and identity we seek to convey? How do we convey differing images to enhance marketing and recruitment? How do we preserve a consistent IUP identity?
2. Given the age of the IUP website, is it still able to achieve its intended purposes?
3. How do we approach a site that must address multiple purposes and how do we balance these needs.

- Marketing
- Recruitment
- Administrative operations
- Directory information
- Marketing
- Recruitment
- Administrative operations
- Directory information

4. How do we balance creativity and consistency?
5. How do we make information easy to find (user friendly)?
6. How do we keep information current?
7. How do we achieve compliance with standards?
8. How do we provide appropriate support? Current decentralized maintenance results in variable quality and is seen by some as an unfunded mandate. Is an alternate approach viable?

STRATEGY

With these three factors in mind, the committee's strategy was to focus on three core areas:

1. Organizational Principles
2. Image and Identity
3. Support and Oversight

Focusing on these three areas, an overall approach was developed that follows from the organizational principles established.

ORGANIZATIONAL PRINCIPLES

The Committee discussed several organizational formats. The current site is built on a hierarchical principle that, for the most part, follows the organizational structure of the university. This structure begins with the top-tier pages and filters down through the organization as one moves into the site.

Supplementing the basic organization are alternative views into the site based on one's perspective – students, faculty and staff, parents, alumni, and visitors. These alternate views seek to cluster the most commonly needed links into a "list of lists" format that further refines the access path. While this is a viable approach in principle, as the site grows it becomes more complex to use and maintain. This approach also requires that the organizing principles adequately reflect the audiences and the information they seek and provide the desired information with ease. The committee's conclusion was that this is not the case with our current site.

An unintended consequence of the current organization is the duplication and complexity in finding and maintaining links to various directory and policy information. Multiple sites may have copies of the same document; versions get out of synch or broken links occur when information is moved. There are many groups that are not adequately captured by our alternative views including new versus current students; businesses seeking interns, employees or educational services; potential donors, granting or contracting entities; and others.

Further complicating the structure is the inherent conflict between the web's role as an image, marketing, and recruiting tool and the role it plays in supporting daily operational and informational needs. Indeed, it is the clash between these two fundamentally different purposes that is a major factor in many of the issues we now face. The hierarchical organization that is at the root of our web site results in a compromise approach that serves neither our image or operational needs as well as it must.

Consequently, the Committee concluded that our current organizational principles are insufficient for a site of our size and complexity. While both the hierarchical and alternate view formats have merit, the mechanisms they provide for organizing, maintaining and identifying a site do not adequately address the full range of user and support needs IUP faces.

IDENTITY AND IMAGE

IUP's current website uses standard templates to create a sense of identity and support navigation. Key problems identified for the site include the size of the fixed area of the templates, the color palette and the limitations the template places on creativity. Among the Committee and across the university, there are various perspectives on the appropriate balance between consistency and creativity.

While the current standards provide some flexibility, the degree of flexibility is tied to where a page is in the hierarchy. This does result in problems with creative expression and marketing. Restricting upper tier pages to the current standards confines creativity to lower level pages and hinders the site's ability to generate interest and attention.

A corollary is the critical needs in image building, marketing and recruiting. Creative and dynamic websites are essential. Colleges and other areas must be able to customize sites to convey their image and attract their audience. Consequently, the committee concluded that our identity and image components must incorporate more flexibility and we must move away from an application of standards based on the level of a page in the organizational hierarchy.

SUPPORT AND OVERSIGHT

When IUP implemented its current web design, responsibility for the web pages was decentralized following the organizational hierarchy used. The assumption was the added work on any area would not be significant enough to cause problems. In a time of budget problems and cutbacks, it became difficult to absorb this extra load. In other cases, there was insufficient technical and design skills to do the caliber of work desired. Many pages did not progress beyond the minimum and needed updates do not always occur.

Compounding the problem is the duplication that results from the current template structure. Our templates are essential static structures where individual maintainers enter and update materials. Users are required to maintain all the information on each of their pages. Any change must be done manually and one must be certain all relevant pages are also updated. In turn, this can require individuals in other areas to make timely changes. Policies and documents appear in multiple locations and may not be synchronized because of the need for manual changes. This technical approach can require a significant amount of work and contribute to out of date information.

A corollary to the support issue is the perception/reality that working on a website is not recognized and rewarded. Faculty fear that website work is not evaluated highly in promotion and tenure, yet their personal sites and the departmental sites many create can be critical components in recruitment and marketing. Staff are concerned that using the web to find information is “not really viewed as working.” As a result, the website is seen as secondary and less likely to attract the level of attention needed.

Confronted with many other demands including the pressures of tight budget times, maintaining web sites often becomes low priority. It is essential to determine what sites are critical and must be constantly maintained and which are less so. For the many areas that are providing basic directory information, more effective methods should be found to ease the burdens.

It is clear that we need a new way of approaching the ongoing support of our web site. The site has become too large, too important and serves too many different purposes to leave major components supported by a totally decentralized model. We need a new balance of central and local control and support. This will force us to confront the hidden costs that are “absorbed” in the decentralized model.

In addition to questions of support, we must also look at the issue of oversight and control. There is disagreement on campus concerning the standards and their applications. There are those who favor a tighter consistency and others who want more flexibility. To some extent, this split reflects the divergent functions of the site – business operations and policy and directory information versus marketing and showcasing.

The same concerns about the size, importance and diversity of purpose that drives the need for a new support model also demands changes in oversight and control. We must shift away from what is primarily a compliance mode to a focus on support for high-quality design and user-friendliness. Issues of interpretation and design are no longer simply procedural issues. As a result, the senior levels of university management must be actively involved in this process.

RECOMMENDATIONS

From this background, the committee members developed a set of recommendations that they believe will improve the quality, utility and currency of our website. These recommendations introduce some new ways of thinking about the site, how we support it and how it will be overseen.

Recommendation 1: The basic organizational principle of our website must be changed from hierarchical to a zone concept. The Committee sees four basic zones defined by the type of activity each performs.

- Directory – This provides the routine contact and identification needed for every office and area.
- Policies – A central repository of policies and standard operating information that would bring such information together, organize and maintain it, and reduce the redundancy and confusion that occurs when policies are handled locally.
- Exhibits – This is an area where marketing, image and recruitment concerns dominate. It is the area where we project our image to the audiences we serve.
- Personal – This is the area for personal pages such as our current student, faculty and staff pages.
- Within each zone, there would be various hubs. A hub would be area supporting a particular entity (e.g. a college) or function (e.g. admissions and recruiting).

Recommendation 2: The standards, image, support and oversight should be tied to the mission and intent of each zone. This recognizes that the balance between consistency and creativity is driven by the fundamental purpose of each zone.

Recommendation 3: The Directory and Policy zones encompass our administrative and support functions and our approach should reflect this operational need.

3.1 The Directory and Policy zones should have their own stylistic treatment and clear standards to create consistency.

3.2 A Content Management System (CMS) should be used for the Directory and Policy zones. This will bring the power of databases and modern web tools to our site while reducing demands on users. To enhance the utility of the web site, users should be able to extract information in these areas in printed form or electronically as 'boilerplate' for proposals, brochures, and so forth.

3.3 Where possible, data from our operational systems (e.g., Banner) should be used to automatically update information in the Directory and Policy zones.

3.4 For information that must be collected in textual form, clear procedures and easy-to-use utilities should be developed to collect and update such information.

3.5 The average office or user should **not** be expected to update the actual web pages in the Directory and Policy zones, only the process that populates the pages.

3.6 Common definitions of what is essential, what is recommended and what is optional should be developed for all areas covered by the CMS. Room for additional items should be provided for offices that choose to use them.

- 3.7 Once designed, the maintenance and regular updating of the Directory and Policy areas should be placed in a production mode and supported through the technology infrastructure.
- 3.8 Each office should clearly understand what information it is required to provide to the CMS. A local manager should be responsible for seeing updates are provided in a timely fashion.
- 3.9 Specific staff should be identified to assist offices in providing needed information and do quarterly reviews of the CMS to assure updates are made in a timely fashion.

Recommendation 4: The Exhibit zone should provide room for creativity and expression to support the marketing, recruitment, image and other such objectives of the university.

- 4.1 This zone should have its own set of standards and guidelines designed to convey the identity and image of the university. Standards should be kept minimal to encourage creative approaches. Such standards should focus on navigation and common identity elements.
- 4.2 Hubs in the exhibit zone that are considered central in nature should be designed in close cooperation with the university's Web Design and Services Center and Advisory Committee on Web Design (see below). The hubs that are central would be designated by the President's Cabinet in consultation with the appropriate senior manager.
- 4.3 A compliance or template approach should not be used for the Exhibit area. Instead, the university should develop a design advisory committee that will work with an area to conceptualize and design an effective site that reflects the IUP image and identity.
- 4.4 The senior manager in an area will be responsible for any Exhibit hubs produced by their departments or offices.
- 4.5 Disagreements about concept, look, identity, navigation, etc., that cannot be resolved among the involved parties should be referred to the university's Web Review Committee.

Recommendation 5: The university should seriously consider the implementation of user portals to enable individuals to build a custom interface that best meets their informational needs.

Recommendation 6: Given the increasing importance of the web, oversight of web issues should occur at the senior management level, preferably by the President's Cabinet, and designated resources should be provided.

- 6.1 A Web Review Committee should be created, chaired by a member of President's Cabinet, and consist of senior managers and faculty to advise on general direction and address concerns about particular sites.
- 6.2 A Web Design and Services Center, similar in concept to the Instructional Design Center, should be established to support the CMS, develop exhibit hubs that are defined as central in purpose, and provide advice and assistance to areas developing their own exhibit hubs.

This unit should be of sufficient size and have sufficient expertise to meet the range of demands involved.

- 6.3 An Advisory Committee on Web Design should be created to advise the Web Design and Services Center. This committee should be created of faculty and technology, communications and others with experience in web design, graphics, photography, technology. It would be available to provide design and technical advice, ideas and concepts to the Web Design and Services Center and to those building exhibits.
- 6.4 Membership on the Web Review Committee and Advisory Committee on Web Design should be rotated to provide new perspectives and give more individuals an opportunity to participate.
- 6.5 The Coordinator of the Web Design and Services Center should be a member of the Web Review Committee and the Advisory Committee on Web Design.

Recommendation 7: A consultant should be engaged to assist the university in implementing this plan.

- 7.1 The consultant should not have a free hand but should be given clear direction and tasks based on this plan.
- 7.2 The consultant should report to the Web Review Committee.
- 7.3 The consultant should be asked for advice on areas such as identity strategies, navigation principles, design strategies for exhibits, etc.

Recommendation 8: The university should explore ways to recognize and reward those who make significant contributions to our web presence.

Recommendation 9: The university should recognize that the web is an evolving entity and respond accordingly. The Web Review Committee should review its basic strategy and emerging issues on a regular basis.