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Plan for a user-centered information architecture

This plan outlines rationale, goals and approach for a user-centered design of the City of Boulder's website's information architecture to ensure it meets user and organizational goals.

Background and Context

The City of Boulder, Colorado, is located 35 miles northwest of Denver, with a population of just over 100,000 residents. The city is approximately 25 square miles in size, surrounded on all sides by nearly 65 square miles of city-owned open space. Boulder is home to the University of Colorado at Boulder and its 36,000 students, faculty and staff; has a vibrant local economy, with significant industry clusters in "clean tech," natural and organic foods, and active living/recreation; and is home to several federal laboratories, including the National Center for Atmospheric Research, National Institute of Standards and Technology, and the National Oceanic and Atmospheric Administration.

The city has a strong and longstanding commitment to environmental stewardship and community sustainability and has been the recipient of significant recognition for its history of innovation. The city government organization values customer service and emphasizes transparency and communication with community members.

About the Website

The City of Boulder's website, bouldercolorado.gov, is the organization's most efficient, most-used method for sharing information with the community and is, therefore, the city's most important communication and e-service delivery tool. Whether for electronic, print or peer-to-peer communication, the city routinely directs the public to the website for additional information. The website is also a highly trafficked portal for digital services, including, but not limited to registrations, payments and applications. This resource receives roughly 1.5 million visitors and 8 million page views a year.

The current version of the city's website was launched in 2013. Prior to the launch of this website, staff conducted both internal and external surveys to learn what was working and not working well with the existing website.

The trends listed below are summary observations reflected in both surveys:

- Information is available on the website but hard to find.
- Looking for something specific is the number one use of the website.
- Much of the content is out-of-date and many broken links exist throughout the website.
- Current website template appears dated and does not portray Boulder.
- Desire for more use of multimedia (videos, photos, etc.) site-wide.
- Desire a mobile version of the website and mobile applications.

The most prevalent improvement opportunities cited by external users include:

- Make contact information for all city employees available and easy to find.
- Need to be able to find information without knowing the department (avoid internal jargon).
- Simplify pages; make them less “cluttered”.

The most prevalent improvement opportunities cited by internal staff include:

- Better search engine.
- Improve website navigation, including friendly URLs.
- Make the website more visually appealing and interactive.

In 2015, the City of Boulder contracted for a high-level heuristic study of the website. The purpose of this study was to identify any functionality, efficiency, consistency, usability, accessibility, navigation, visual design and “best practice” issues so they could be addressed as part of future work.

A key finding of the 2015 report was the need for the city to revisit and refine the website information architecture, which is the organization, structure and labeling of web content. This finding is a primary impetus for the work described in this RFP: developing a user-centered information architecture for the city website. The heuristic study findings are one of many resources the city can provide the vendor to support their work on this information architecture project.

Context and Current Challenges

Business Challenges

- Lack of a unified eCommerce solution.

Site Usability

Findability

- Poor content discoverability; users have trouble seeing the breadth and depth of available content.
- Inadequate search capabilities.

Content

- Some redundant and/or duplicate content
- Overly complex navigation.
- Inadequate search capabilities.
- Content is written at an average of a 10th grade level which is considered difficult to read.

Usability

- Site is not fully optimized for mobile

Accessibility

- The site does not fully comply with accessibility requirements

Branding

- Lack of engaging design inadvertently gives the impression of a lower quality experience.
- Integrate photos and optimize for all screen sizes.

Processes/Governance

- Train staff members to submit content to the web team.

Objectives and Goals

This project has a variety of objectives, including:

Content Organization and Navigation

- Establish a series of benchmarks for our existing website to understand what is working and not working with our existing navigation
- Establish a content inventory of existing pages, resources, forms and services and identify how these can be combined, reclassified and referenced in the new information architecture
- Develop a new system of organizing city web content that is intuitive for the end user and not based predominantly on city organization.
- Design the city website's navigation and content organization based on user testing, analytics and stakeholder feedback.
- Identify "low-hanging-fruit" solutions during this phase of the project that staff can quickly and easily apply to the current city website.

- Make the most requested services and information visible and accessible to the public in an intuitive way.

Communication

- Ensure the website content structure supports and is aligned with the city's vision, values and digital communication strategy.
- Develop an updated web content strategy to streamline the process managing web content and improve the quality, accuracy, consistency and timeliness of pages on the website. This will likely include reducing the number of staff who have access to edit the website, as recommended by the heuristic report, as well as increasing the responsibility of Communication Department staff in managing, developing and approving web content.

Service Delivery

- User test popular and high-priority services on the website to gauge their ease of use.
- Make recommendations on adding, improving and streamlining services on the website to benefit users and increase organizational efficiency.

Technical

- Ensure the project complies with all IT technical requirements, including security.
- Create an information architecture accessible for all people that is designed to follow Section 508 requirements and standards
- Create a “mobile first” information architecture optimized for and designed with mobile users in mind.
- Ensure project addresses recommendations outlined in the heuristic study report. Needs for the website will be used to develop a new information architecture.
- Define a methodology for how search fits into the information architecture

Scope

IN SCOPE	OUT OF SCOPE
https://bouldercolorado.gov/	https://www.secured-server.biz/BoulderColorado/HP/
http://user.govoutreach.com/boulder	https://www.beheardboulder.org/

Project Approach and Methodology

In the proposed project methodology, usability and usefulness are assured by building them into products and services through a process of user-centered design (UCD). UCD is a systematic, model-driven approach and philosophy that places users and their needs - together with your business goals - at the center of the development process. UCD is not just usability testing; it is a full-scale development process with activities from the planning stage through design, development, launch and maintenance - continually improving and validating a website with users.

There are five basic characteristics that define the UCD process:

1. **Goal-driven and user focused:** Identify who the target users are, how they work and what their goals are. Align user goals with business goals to lay the foundation for a successful project.
2. **Empirical:** Based on data not opinions. Usability, usefulness and value are measured by target users' behavior with the website, not opinions about the website
3. **Iterative:** Try out ideas in a low-risk format. Success requires drafts and revisions. Investigate solutions with users prior to coding by creating prototypes and mockups. When problems are found in the website or applications during usability studies, they are fixed in subsequent versions before the system is launched.
4. **Collaborative:** Multidisciplinary; requiring a team approach. Leverage a variety of skills sets, such as project management, user-centered design, graphic design, interaction design, writing and coding.
5. **Scalable:** Adapts to fit resources and time. The user-centered design process scales to different challenges such as budget constraints, scheduling and resource constraints.

Research

The research phase forms the foundation of the process. It involves conducting research activities to understand target users, and identifying stakeholder, business and branding goals. This phase ensures the new design is rooted in clear user, usability and organizational requirements before testing or design work begins.

Activities and deliverables include:

- Integrated work plan and schedule

- Communications plan
- On-site surveys
- Stakeholder interviews
- User Surveys
- Staff Surveys
- Field Research
- Web & search analytics
- Goals and metrics
- Top Task Analysis

Concept

This stage focuses on establishing the informational design of the website which includes the content strategy, information architecture, and key features before committing to a specific design.

Activities and deliverables include:

- Personas
- Information Architecture (IA)
- Closed card sort
- Draft IA
- Test IA (2-3 rounds)
- Finalize IA
- Content Strategy
- Content audit
- Content improvement plan, training and guides
- Content governance
- Research findings
- Basic wireframes

Iterative Design and Testing (NOT IN SCOPE OF THIS PROJECT)

The iterative design and testing phase involves creation of wireframes and visual mockups in order to develop, usability-test, and refine the final website design. Wireframes will enable the City of Boulder to evaluate the design with users early, before the final system is produced.

Activities and deliverables include:

- Paper prototype
- Paper prototype usability test & iterate
- Wireframe design
- Wireframe usability test & iterate
- Visual design /style tile
- High-fidelity usability test

Each design cycle includes more detail and interactivity. By the final design cycle, we'll have determined a high-fidelity look and feel for the new website.

Build (NOT IN SCOPE OF THIS PROJECT)

This phase involves the actual creation of the website and templates.

Activities and deliverables include:

- Server/infrastructure set up
- Build out high-fidelity prototype
- Iterate and finalize templates
- Build out
- Content input
- Functional testing

Launch & Measure (NOT IN SCOPE OF THIS PROJECT)

After the website is launched, further usability tests and customer/user research will be conducted to evaluate success.

Activities and deliverables include:

- Functional/QA and Load testing
- Internal beta launch
- Launch

UCD Consulting & Project Management

Effective project management, ongoing consulting and knowledge transfer is a crucial part of advancing UCD projects to success.

Activities and deliverables include:

- Manage plan, timeline and budget. Project management - adjust timelines, tasks, approach and UCD deliverables such as designs based on shifting project focus, scope and requirements.
- Develop status and final reports
- Weekly team meetings, sponsor check-ins and other communications.
- Presentations and meetings with stakeholders to educate about the UCD process and findings to gather feedback at critical milestones and foster buy-in for project results.
- Ongoing consulting and assistance with content governance, participant recruitment, stakeholder communication, design feedback and requirements.

Roles and Responsibilities:

In May 2018, the city engaged a consultant, GearLab, to develop a blueprint for a new city website, a more versatile organization of information, based on user research, testing and input from internal and external customers. The project is expected to complete in September 2018 and the city will be working closely with GearLab to move it forward. This document outlines the roles and responsibilities of city staff in this project. GearLab has outlined the roles and responsibilities of its team in a separate document.

City Project Team

A project team will convene at several engagement points during the project. This will allow the team to meet when decisions and input are needed, but also afford them the time to work on project tasks. The project team will consist of department liaisons primarily from the web manager team. The larger web manager team will be continuously updated and asked for input throughout the project but will not be required to attend project meetings unless part of the project team. The project communication plan will dictate how and when key updates and opportunities for input will be communicated to other stakeholders and city staff

Roles and Responsibilities for Key Internal Stakeholder Groups

Executive Sponsors

Tanya Ange, deputy city manager
Patrick von Keyserling, director of communication

Julia Richman, director of Innovation and Technology

Duties:

- Provide feedback and input at key stages throughout project
- Remove project roadblocks
- Secure and approve funding as required
- Champion the project to upper management
- Serve as the final decision-makers

Project Manager

While this project is a collaboration between Communication, IT and CMO, Communication is leading this scope of work.

Bryan Bullock, digital communication manager

Duties:

- Manage all aspects of the project, including communication with vendor
- Complete project task assignments as required
- Communicate project status to executive sponsors (including timeline of key decision points), project team, web managers and other stakeholders
- Maintain public-facing project website

Project Team Members

Bryan Bullock, digital communication manager

Ben Irwin, deputy director of communication

Jim Creese, assistant director of application services

Leslie Labrecque, senior webmaster

Duties:

- Attend and participate in weekly project meetings
- Provide feedback and input as required
- Complete project assignments on time
- Communicate task status to project managers
- Make recommendations to executive sponsors on major project decisions

Directors

Department directors and division leaders

Duties:

- Attend project kickoff meeting in July to provide project input or, if unable, share input through alternate means
- Provide feedback and input at key stages throughout project
- Provide input to help project team make recommendations to executive sponsors on major project decisions

Web Manager Group

Web content managers in departments across the city

Duties:

- Provide feedback and input as required
- Complete project tasks on time
- Communicate task status to project managers
- Communicate project status to department
- Provide input to help project team make recommendations to executive sponsors on major project decisions

Frontline and Project-level Staff

Small, representative group of staff who rely on the website to provide customer service, but typically do not directly manage content

Duties:

- Attend project kickoff meeting in July to provide project input or, if unable, share input through alternate means
- Provide feedback and input at key stages throughout project
- Represent department and customer service needs, particularly high-use departments, such as Parks and Rec and OSMP
- Includes representatives that are working in the areas of Neighborhood Services, customer service and engagement, etc.
- Provide input to help project team make recommendations to executive sponsors on major project decisions

Communications Plan

Goal

Maintain effective two-way communication about the website project across the City of Boulder so that information and ideas can be easily shared, fairly evaluated and effectively adopted to reach the objective of a highly functional, attractive and citizen-centered website.

Objectives

1. Establish communications platform that allows equal access to project information, timelines, and resources.

Tasks:

- Internal Communication
 - Create project on Basecamp
 - Create project on [Be Heard Boulder](#)
 - Provide regular updates as part of the City of Boulder employee newsletter
- External Communication
 - Provide updates to citizens via Social Media
 - Provide updates to citizens via City of Boulder email newsletter

2. Provide regular project updates to key City of Boulder groups within the regular meeting structure to avoid requiring additional meetings.

Tasks:

- Core web team members will attend and provide updates to: IT Steering Committee

3. Create a few targeted stakeholder groups to provide feedback and essential information for the project. Clearly convey and make effective use of their time.

Tasks:

- Identify citizen-facing employees
- Identify key stakeholders
- Identify content team
- Identify select stakeholders

4. Ensure that project decision making is clearly communicated so that roles and responsibilities are understood by all parties.

5. Through effective communications, create an empowered long-lasting web team across the City of Boulder with supported governance system.

Tasks:

- Develop an interim web design project governance plan
- Develop and adopt a lasting website governance plan

Recommended Communications Plan

DATE	INTERNAL / EXTERNAL	VEHICLE	DELIVERABLE	KEY MESSAGES / NOTES
6/04/18	Internal	Email	Intercept Survey	<ul style="list-style-type: none"> Adding an intercept survey on the existing City of Boulder website
6/11/18	Internal	Email	Remote Website Survey	<ul style="list-style-type: none"> Creating a website survey on Be Heard platform
6/18/18	External	Social Channels Email Newsletter	Website Survey	<ul style="list-style-type: none"> We need your feedback about the website, please fill out a survey
6/18/18	Internal	Email Basecamp Meeting Invites	Workshops Focus Groups Interviews	<ul style="list-style-type: none"> Finalize dates / times for SiteCrafting visit and workshops Send out meeting invites If necessary, send additional email with background details about the project
Post- SC Visit	Internal	Email		<ul style="list-style-type: none"> Thank you for your participation in the workshops, focus groups, and interviews
6/23/18	Internal	Email Basecamp	Public Event	<ul style="list-style-type: none"> Finalize date / time for SiteCrafting visit and event
8/6/18	External / Internal	Social Channels Email Newsletter	Citizen Surveys Employee Surveys	<ul style="list-style-type: none"> We need your feedback about the website, please fill out a survey
Mid- Aug	External	Social Channels Email Newsletter	Public Event	<ul style="list-style-type: none"> Promote / encourage participate for public event
8/13/18	Internal	Email Basecamp Meeting invite	Research Findings Report	<ul style="list-style-type: none"> Finalize date / time for SiteCrafting visit Send out meeting invite for stakeholders

Deliverables

- Written report documenting findings from a user needs analysis that will help city staff better understand how the public is using the city website and inform how the city manages the website
- Raw survey data from any surveys conducted as part of the research
- Documentation to help staff conduct light user testing going forward to test iterative improvements to the website
- A new information architecture methodology to include:
 - high-level sitemap
 - Wireframe designs illustrating the application of the new architecture
 - User personas
- A written content strategy containing guidelines for ensuring consistent application of the architecture
- A written recommendation for how current and future e-services including web-based and mobile applications should be integrated into the architecture

Governance

As part of the design effort, it is critical to prepare, pilot and refine a clear governance model. Currently there is no enterprise governance model. As a consequence, vague ownership and role definitions; unclear content creation, guidelines and standards has resulted in fragmented sites, lack of compliance with branding visuals and messaging, and duplication of effort across teams.

Creating good governance solutions requires:

Clear Roles

- Common governance roles:
 - Technical - manage the system
 - Editorial - manage the process and content
 - Content Creation - track, create, update and remove content

Strategy

Clear site content that is properly targeted to site audiences that also adheres to the organizational branding guidelines requires:

- Brand guidelines
- Style guidelines
- Written governance guidelines:
- Who can add/modify/delete content
- Frequency of content inventory tracking and content refreshing
- Decision-makers - who can decide what changes or additions can be made to the site as a whole, including business strategy

Community

A key element to maintaining the governance structures created is to establish regular means for all roles involved in maintaining a website to exchange ideas, methods and discuss new plans.

- Decision meetings
- Training Meetings
- Strategy meetings
- Discussion areas (in-person or online)

Constraints

- Budget: Project must be complete using a total allocated budget of \$49,000. There is no opportunity to request additional funding.

Risk Management

ID	CATEGORY	RISK	LIKELIHOOD	IMPACT	MITIGATION
1	Time	Completing specific UCD activities as part of a public event requires citizen involvement.	L	M	<ul style="list-style-type: none"> • Use multiple methods for collecting data • Schedule event ASAP
2	Scope	Project scope expanding uncontrollably.	L	H	<ul style="list-style-type: none"> • Clear deliverables • Regular check-in's with both teams

3	Budget	Going over the limit of the fixed budget.	M	H	<ul style="list-style-type: none"> Define work in phases Adjust scope and/or change methods as needed Communicate impact and changes
4	Timeline	Estimated timeline is 4 months. Any delays will intensify existing pain points.	L	M	<ul style="list-style-type: none"> Scope project tightly Frequent and detailed communication
5	Content	Content inventory, creation and editing work can take longer than expected.	M	H	<ul style="list-style-type: none"> Identify content owners early. Start content inventory process early.
6	Content	Content owners may be unidentified, unavailable and/or need training	H	H	<ul style="list-style-type: none"> Identify content owners early Instill process for tracking content owners + replacing as needed. Identify content owner lead/trainer

Timeline

TASK	MILESTONE / DELIVERABLE	DATES	NOTES
Kick-Off Meeting	Milestone	5/23/18	
Research & Testing Work Plan	Deliverable	5/31/18	
Communications Plan <ul style="list-style-type: none"> Explanation of User-Centered Design Internal and External Communication Channels 	Deliverable	6/01/18	
Existing Website Intercept Survey	Milestone	6/5/18	Occurs only after communications related to the survey
Initial Lexicon/Controlled vocabulary created	Deliverable	6/5/18	
Remote Website Survey	Milestone	6/15/18	Be Heard Boulder

			platform
Existing Website Content Inventory & Analytics Review	Deliverable	6/15/18	
<p>On-site Field Research Goal-Setting Workshops (Consensus building activity)</p> <ul style="list-style-type: none"> ● Audience: Citizen-facing employees <ul style="list-style-type: none"> ○ Focus: <ul style="list-style-type: none"> ■ What are your goals for the new site? ■ What are citizens/constituents trying to do on the site? Why are they calling/contacting? ● Audience: Key stakeholders <ul style="list-style-type: none"> ○ Focus: <ul style="list-style-type: none"> ■ Presentation: What we're doing and why we're doing it. Explanation of User-Centered Design process and purpose. ■ What are your goals for the new site? ■ What are citizens/constituents trying to do on the site? ● Audience: Content Team <ul style="list-style-type: none"> ○ Focus: <ul style="list-style-type: none"> ■ What functionality do you need for the new site? ■ What pain points are internal customers experiencing? ■ What is the current content production process? <p>Staff & Stakeholder Focus Groups & Interviews (listening sessions)</p> <ul style="list-style-type: none"> ● Audience: Select stakeholders (internal customers that need a seat at the table, but don't fit into the other groups) & web content team <ul style="list-style-type: none"> ○ Focus: 	Milestone	7/9/18 - 7/13/18 OR 7/16/18 - 7/20/18	On-site in Boulder

<ul style="list-style-type: none"> ■ What are your goals for the new site? ■ What are your current pain points with the site? 			
User Research <ul style="list-style-type: none"> ● Card Sorting <ul style="list-style-type: none"> ○ <i>Internal*</i> ○ External ● Top Task Analysis <ul style="list-style-type: none"> ○ Citizen Top Task analysis ○ <i>Internal Customer Top Task analysis*</i> 	Milestone	8/01/18	
Usability Testing & Field Research <ul style="list-style-type: none"> ● Surveys <ul style="list-style-type: none"> ○ Citizen Surveys ○ <i>Internal Customer Surveys*</i> ● Baseline usability testing ● Public Event 	Milestone	8/6/18 - 8/10/18 OR 8/13/18 - 8/17/18	On-site in Boulder
Initial Information Architecture <ul style="list-style-type: none"> ● Knowledge Map ● Taxonomy & Ontology Development 	Deliverable	8/24/18	
Information Architecture User Testing & Revisions <ul style="list-style-type: none"> ● Tree Testing 	Milestone	8/31/18	
Information Architecture, Basic Wireframe, Content Governance plan	Deliverable	9/15/18	
Research Findings Report & Presentation (including Personas and user flow diagrams)	Deliverable	9/15/18 - 9/30/18	On-site in Boulder
Information Architecture, Basic Wireframe, Content Governance plan (w/final revisions)	Deliverable	9/28/18	

*Added 5/24/18