Website Governance Guide

Haldimand County

26 July 2024

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1.   Introduction

Haldimand County's website is the public face of the municipality. It is important that our web presence engages the audiences we serve and reflects their needs. A website visitor should experience the same considerate welcome and sense of inclusivity as a visitor to our administration building. They should expect to have issues resolved quickly, to have questions answered thoroughly and to leave our site satisfied, with a positive image of the County.

Managing our website requires a coordinated team effort from staff across all divisions. To ensure that our website is useful, relevant, and beneficial to our community and stakeholders, we need to commit dedicated time and resources when adding, updating, and deleting content.

1.1   Website Guiding Principles

The Haldimand County website and associated sites are guided by three main principles:

1. **Our website visitors come first** – all of our work, from content to design, is created with the needs of our audiences in mind.

2. **We are consistent with our brand** – the County's brand should be reflected in our website's structure, language, visuals and calls to action.

3. **Our site is always improving** – Our website is never a finished product. We are committed to continuous improvement, using data-based analysis to better meet user – and County – expectations.

1.2   Purpose of this Guide

The Governance Guide is intended to:

- Ensure content on the website is accurate, up-to-date, relevant, accessible and consistent with messaging in all communications;
- Identify individuals responsible for the maintenance of specific content on the site along with individuals who are accountable for the overall management of the website;
- Streamline the content management process; and
- Equip team members with the resources, guidance and support needed to effectively manage content.

As the website is not a static entity, neither is this guide. It will be reviewed annually to ensure it meets the needs of the corporation and will be updated as needed.

2. Roles and Responsibilities

This section outlines the roles and responsibilities for web content development and management. This will empower staff to take responsibility for website content and provide accountability.

2.1 Oversight and Strategy

2.1.1 Web Governance Committee

The Web Governance Committee provides broad oversight for Haldimandcounty.ca and associated sites and ensures corporate strategic alignment. They consider new website requests and ensure overall website quality as a vital public service.

The Web Governance Committee will be a recognized sub-committee of IT Governance and meet a minimum of two times a year. Committee membership with be reviewed in Q4 each year to ensure that it represents the most effective group for the upcoming year based on the website's strategic roadmap.

Responsibilities of the Committee include:

- Broad oversight for the strategic direction of Haldimandcounty.ca and associated sites.
- Ensuring site quality and content integrity as well as compliance with all legal and regulatory standards, including accessibility, security and protection of personal information.
- Evaluating requests to develop new features and integrations brought forth through the TSR process.

The committee is composed of:

- Senior Management Team representative (1 member)
- Manager, Customer Experience & Communications
- Chief Information Officer (or designate)
- Supervisor, Customer Experience & Communications
- Project Manager, Communications
- Project Manager, Continuous Improvement
- Accessibility Coordinator
- Information & Privacy Coordinator

2.1.2 Customer Experience & Communications (CEC)

Primary strategic direction and oversight for Haldimandcounty.ca and associated sites is led by the Customer Experience & Communications division, working closely with the Innovation & Technology Services division who provide consultation and support.

CEC is responsible for:

- Setting website direction and policies based on best practices and the needs of site visitors.

- Setting measurable goals and web key performance indicators (KPIs) to ensure website success.

- Providing training and support to editors for use of the content management systems, website best practices and Accessibility for Ontarians with Disabilities Act (AODA) compliance.

- Researching and evaluating best practices, industry trends, and new technologies and solutions to bring forward to the Web Governance Committee.

- Working with the vendor to ensure software is up-to-date, and managing the digital service agreement.

- Overseeing the Haldimand County Web Team, adding/removing users, managing permissions, and making final decisions on members.

- Monitoring adherence to the County's Brand Guidelines across all associated sites to ensure a consistent look and feel for all County messaging.

2.2   Website Content

2.2.1   Subject Matter Experts (SMEs)

For web content to be current, correct, and meaningful to residents, divisional subject matter experts need to work closely with Content Editors to ensure the right information is going out to the public. SMEs include staff across all levels of the corporation who are closely involved with the content presented on the website.

All staff members whose work includes information that must be provided to the public is an SME.

It is the responsibility of all SMEs to keep their content up-to-date. Examples include project managers ensuring updates and outcomes are posted on project pages, program leaders ensuring dates and descriptions of activities are correct, or committee liaisons providing updates on meeting dates and agendas.

SMEs who have identified content for the website work with Content Editors to get the updates posted. In some instances, the SME may also be the Content Editor.

2.2.2   Content Editors

Content Editors are a decentralized group of team members across the organization who are given the ability and flexibility to create, monitor and maintain website content related to their area of responsibility and expertise.

The role of the Content Editor is to:

- Work with SMEs to maintain ownership of their pages and ensure up-to-date content

- Regularly add, change, update and remove expired content that falls within their assigned area of responsibility on the site for accuracy and relevance (Note: all content created, changed or removed by Content Editors will be reviewed, edited and approved by a Content Manager before going live on the website)

- Review page content on a quarterly basis following the Content Maintenance process outlined in the Governance Guide

- Check spelling and grammar of content

- Apply principles from the Writing for the Web and Accessible Document training to web content and PDFs

- Seek advice, guidance and support, when needed, from Content Managers on content management and writing for the web (such as how to write more concisely, tips on transforming complex and lengthy technical information into language the general public will understand, etc.)

2.2.2.1   Special access exceptions

- Some content editors may be given special access to directly publish certain types of content. This is approved on a case-by-case basis by a Website Administrator. Examples could include editors who post emergency information or editors who have consistent after-hours updates. This streamlined access will only apply to the specified content type and regular access would apply to all other web page updates.

2.2.3   Content Managers

Content Managers review all content prior to publishing and are responsible for the oversight of website content as a whole.

The role of the Content Manager is to:

- Review and publish website pages

- Assist in identifying content that would benefit the public

- Coordinate all homepage content and changes to calls to action

- Work with Content Editors to remove content if it is out-of-date, inaccurate, or inappropriate

- Ensure content aligns with the writing and brand guides

- Ensure page layout and design is consistent

- Add photos and graphic elements (e.g., buttons) to ensure the visual appearance of the page is pleasing and usable

- Check accessibility and ensure content meets Web Content Accessibility Guidelines (WCAG) 2.1***** Level AA compliance, as required by the Accessibility for Ontarians with Disabilities Act (AODA)

- Review spelling and grammar

- Add new pages - ensure proper placement within the sitemap and ensure that content is not duplicated

- Ensure non-relevant pages are deleted or archived

- Understand overall website architecture and where content belongs

* Current AODA guidelines stipulate a compliance level of WCAG 2.0, however, Haldimand County is committed to achieving WCAG 2.1 at minimum and 2.2 wherever possible.

2.2.4   Website Administrators

Website Administrators manage system-level updates and actions (such as user permissions, integrations and design items), and works closely with the website vendor to confirm ongoing site compliance, security and user experience. A Website Administrator may also function as Content Managers as needed to provide content support to SMEs and Content Editors.

2.2.5   Web Team

The Web Team is the group of Haldimand staff authorized to make changes to the website. Web Team members are selected based on role and cannot be re-assigned to other staff except in exceptional circumstances at the approval of a Website Administrator. The Web Team will meet a minimum of three times a year, with additional activities (such as training refreshers, new product explanations, etc.) arranged as needed.

2.2.6   Role Responsibility Chart

Responsibility	SME	Content Editor	Content Manager	Website Administrator
Monitoring content regularly	✓	✓	✓	✓
Writing new content	✓	✓	✓	✓
Suggesting location of new content pages on sitemap	✓	✓	✓	✓
Web Team Member		✓	✓	✓
Updating content in CMS		✓	✓	✓
Removing out-of-date content		✓	✓	✓
Incorporating supporting photos, visuals, video, etc.		✓	✓	✓

Responsibility	SME	Content Editor	Content Manager	Website Administrator
Ensuring divisional contact information is up to date		✓	✓	✓
Enforcing web-writing guidelines and website governance			✓	✓
Creating new website pages; deleting website pages			✓	✓
Maintaining the sitemap			✓	✓
Approving and publishing content			✓	✓
Approving the use of web forms and surveys; setting up web forms and surveys			✓	✓
Making changes to the homepage			✓	✓
Adding/removing Content Editors and Content Managers				✓
Making design changes to the site				✓
Altering user permissions				✓
Web reporting and audits including security and performance testing, accessibility compliance, and analytics				✓
Overseeing new implementations				✓

Table 1 Role responsibility chart

3. Training plan

Organizational staff must receive training on content writing and accessibility before contributing or approving content for the public-facing website. This will help ensure that content meets web accessibility legislation and web writing best practices.

3.1 Foundational Writing and Accessibility Training

All staff who write, review and approve content for the website will receive training in the following topics:

- Writing for Web
- Accessibility

This includes SMEs, Content Editors and Content Managers.

3.2 Basic CMS Training

All Content Editors will receive basic Content Management System (CMS) training, covering the following topics at a minimum:

- Text editing including links
- Adding images
- Uploading documents and file management
- Tables, accordions, and components
- News Module
- Calendar Module

3.3 Advanced/specialized Training

All Website Administrators and Content Managers will need additional training:

- Content Management System administrative training
- News and Calendar Module administration
- User permissions
- Forms Module training

4. Content Writing and Approval Process

We use this content publishing timeline and approval process when making edits to website content, including posting PDF documents.

4.1   Audiences

The primary target audience for Haldimand County's website is current residents of the municipality. In particular, the homepage and most visible navigation are intended to allow residents with quick and easy access to frequently requested services, County news and notices, and seasonal promotions.

Pages deeper into the site and microsites might serve different audiences. For every page, it is essential to consider: who is the primary audience for this page? What action do I want my audience to take here?

4.2   Publishing Timeline

Updates submitted through the CMS by Content Editors will be reviewed within one business day as per the Content Approval Process. Submissions that do not adhere to the Web Style Guide, Writing Style Guide, and this Governance Guide, will not be approved and will need to be reviewed by the SME and Content Editor and re-submitted.

Requests for new website pages, news posts, new or edited web forms, friendly URLs, and page layout changes, must be submitted to Customer Experience & Communications through a Content Request Form at least one week in advance of the posting date. Depending on the complexity of the request, a longer timeline may be required.

There are two exceptions to the standard timeline:

1. For newsworthy or time-sensitive content (e.g. service disruptions, emergencies and content can be streamlined through the process and published on a shorter timeline

2. If content requires extensive accessible document remediation, the timeline will need to be extended.

4.3   Content Approval Process

We use the following process to make updates to content on the website for edits on existing pages and calendar events:

1. The SME drafts or identifies content for the website and shares it with the Content Editor. (If a PDF document is included, it should first be reviewed by the division's Accessibility Ambassador and remediated if needed before sending it to the Content Editor)

2. The Content Editor posts the content in the CMS in line with the Web Style Guide and Writing Style Guide.

3. Within one business day, the Content Manager will review submitted content and either approve and publish or reject it for further editing.

4. Submissions requiring further edits with be sent back to the Content Editor with comments.

5. After the required changes are made, the Content Editor must re-submit through the CMS and the publishing timeline will begin again.

4.4   Content Request Form

Requests for new website pages and special content items must be submitted to the Customer Experience & Communications division through the Content Request Form. Routine content edits to existing pages do not require a form submission and can follow the <u>usual content approval process</u>.

The following details will be required for all requests:

- Type of request (new page, news post, new form, form edit, friendly URL, layout change)

- Specific details around the content request. For new content, the applicant should provide the complete text that needs to be included.

- The date that the content needs to be posted (the applicant must provide a minimum of one week's advanced notice) as well as an option for timely notifications, only to be used in emergency circumstances.

- Date to remove the content (if required)

- Files of any applicable media (e.g. PDFs, images, videos, etc.)

4.5   Criteria for Publishing Content

To publish content on the website, the following criteria must be met:

- Completion of the publishing process;

- Images are sourced from a platform that allows for the sharing/use of the image, with proper credit given to the creator, if applicable; and

- The website is not being used as a document archive. Content that needs to be kept internally is housed in shared drives or other internal repositories.

5.   Microsites and Integrations

A microsite is a website that is meant to function as a separate entity within an existing website. A microsite can have its own domain name or subdomain. Haldimand examples include haldimandtourism.ca and haldimandlibrary.ca.

Website integrations refers to website functionality that relies on third-party software, or items that need to connect to any of our internal systems.

5.1 New Microsites

New microsites may only be established with the approval of the <u>Web Governance Committee</u> and must go through the TSR Process. Approval from the Web Governance Committee must be granted before submitting the TSR request.

All requests for new microsites must include justification for the need and how it will benefit the public. Requests to the Web Governance Committee can be sent to <u>website@haldimandcounty.ca</u>.

5.2 Existing Microsites

All microsites are required to adhere to the guidelines in this governance document and are still subject to the oversight of the Web Governance Committee and CEC. User roles and responsibilities, training, and content publishing will remain consistent across all County sites.

Microsites will have an individualized Web Style Guide distinct to their design and layout, but are still required to follow the corporate Writing Style Guide and accessibility standards.

5.3 Website Integrations

Requests to add functionality or integrate third-party software to the current website must be approved by the Web Governance Committee and may also be subject to the TSR Process. Approval from the Web Governance Committee must be granted before submitting a TSR request. Requests to the Web Governance Committee can be sent to <u>website@haldimandcounty.ca</u>.

6. Content Audits and Maintenance

All website users and SMEs are responsible for the regular review of content. This will help you make decisions about what content needs to be updated, removed or added to the website.

6.1 Content Review Schedule

Website content needs to be reviewed regularly to ensure it is accurate and up to date. We recommend that each area develops a content review schedule to ensure that that their content is reviewed at least once per year using the best practice assessment process outlined in section 6.2.

For example:

- Divide your content into sections
- Look at all the content in the first section in the first quarter of the year, then look at the next section in the following quarter
- Continue reviewing sections of content until complete

- Once finished, start over again

When reviewing content, check each of the factors outlined in the best practice assessment and then analyze the results to find out what updates need to be made. You should also run a broken links check for the entire website each quarter and fix all broken links.

6.2   Web Content Audit Best Practice Assessment

For a best practice content audit, measure each of your pages' performance against the following factors:

- **Usability** – review content for reading grade level, plain language, length of paragraphs, use of headings and sub-headings, spelling and grammar, etc.;

- **Findability** – content isn't useful if it isn't findable. Review content to ensure it appears in the website navigation, in-site search and has appropriate metadata, such as page descriptions;

- **Actionability** – what is the purpose of the content? Do users know what action or step they need to take after reviewing the content? Make sure there are clear calls to action (if appropriate) and that the content links off to any relevant websites and resources so users can take the appropriate next steps. We don't want users to reach a dead-end in the content;

- **Audience** – not every page on your website is intended for all users. Identify the main audiences for your website and make sure that content is written with the core audience in mind. Depending on the page, the audience may differ; (e.g., doctors and health care professionals, new or expectant mothers, staff, etc.)

- **Accuracy** – inaccurate or outdated content can mislead and confuse users. Work with internal subject matter experts to ensure that all content is up to date with the latest information and processes;

- **Tone and inclusive language** – does the content follow brand guidelines around tone, equity, inclusion and diversity?

- **Accessibility** – review content to make sure that alternative (alt) text is included for all images, heading levels are tagged properly, link text is written in an accessible manner, table captions are added and tables have header rows, etc.

7.   Style and Brand Guides

Style guides and brand documents ensure that content across all County sites is consistent and professional.

All sites and content are required to adhere to:

- Website Style Guide
- Writing Style Guide
- Haldimand Branding Guidelines

8.   Definitions

Accessibility for Ontarians With Disabilities Act (AODA) – The <u>Accessibility for Ontarians with Disabilities Act</u> (AODA) is a law that sets out a process for developing and enforcing accessibility standards.

Content Editor – Web Team member with access to the CMS and the responsibility to create, monitor and maintain website content related to their area of responsibility and expertise.

Content Management System (CMS) – The web-based platform used to update website content. Access to the CMS is limited to the Web Team and Website Administrators.

Content Manager – Web Team member responsible for reviewing and approving all content before publishing, as well as the oversight of website content as a whole.

Friendly URL – A shortened version of a web page's URL used for marketing and communication that's more easily remembered by the public. Often utilizes just one word, such as **Haldimandcounty.ca/taxes** instead of Haldimandcounty.ca/home-property-environment/property-taxes/.

Integration – Website functionality that relies on third-party software, or web items that need to connect to any of our internal systems.

Microsite - A website that is meant to function as a separate entity within an existing website. A microsite can have its own domain name or subdomain. Haldimand examples include haldimandtourism.ca and haldimandlibrary.ca.

Style guide – A document that establishes a corporate style for something by outlining a set of standards to ensure consistency. Style standards can apply to a number of items such as writing, design, corporate brand, etc.

Subject Matter Expert (SME) – Any staff member in the corporation who has in-depth knowledge of information posted on any website page.

Web Content Accessibility Guidelines (WCAG) - The Web Content Accessibility Guidelines (WCAG) is an internationally recognized standard created by the <u>World Wide Web Consortium (W3C)</u> with the goal of making web content more accessible to people with disabilities.

Web Team – An approved group of cross-divisional staff responsible for the day-to-day maintenance of website content. Includes Content Editors, Content Managers, and Website Administrators (as needed).

Website Administrator – Web Team member with system-level access to perform administrative functions and liaise with the vendor on updates and troubleshooting.

Website audit – A process of systematically reviewing existing website content to ensure it is current, correct, and performing as expected.