**IS-06 Exam  
Candidate: Jonathan Ward**

***Manager, Web and Social Media***

***Communications Branch***

***Library and Archives Canada***

**Knowledge of ongoing and emerging Web practices and trends**

**Knowledge of Treasury Board Web Standards and their application in a departmental context**

**Task 1:**

The new Deputy Head at Library and Archives Canada is keenly interested in revamping the departmental website.His Chief of Staff contacts you to request a briefing note outlining how you would undertake this initiative **using ongoing and emerging Web practices and trends**.

1. Outline what steps should be followed to complete this task and what specific information you would highlight in this note, **including the Treasury Board Web Standards applicable to this situation**.

**Answer:**

The following list outlines what steps I would undertake to complete a web revamp exercise at LAC:

* Seek additional, informal feedback from the Deputy Head’s Chief of Staff to gauge the scope of the desired revamp and the Deputy Head’s preference for something more edgy or more conservative in nature and design.
* When drafting the briefing note, explain clearly the rationale for a significant revamp. Specifically, that:
  1. LAC’s website is good and relatively new, but there is always room for improvement
  2. People have less and less patience for websites that do not function intuitively
  3. Best practices in web now include designing sites to be usable (intuitive, logical, well laid-out) focused on the user (“I’m a…”) and focused on tasks (“I want to…”)
  4. More people now access websites on their mobile devices than on traditional computers, so a responsive design (applying the usability standard) is critical
  5. LAC needs to align its web content with the GC push towards centralization of online content (Canada.ca, Open Data, identity management, etc.)
  6. LAC needs to continue complying with the four TBS web standards
* I would not include detailed information about the technical requirements of the TBS web standards in a high-level briefing note, but I would ensure the web team has a detailed assessment of the website’s compliance with the four standards. Specifically:
  1. Accessibility: ideally LAC would be 100% WCAG compliant, since the deadline for rendering online GC content accessible was July 2013.
  2. Usability: ideally LAC would meet requirements 6.1.2 and 6.1.3 of the usability standard (notices), as the deadline was also July 2013. The proposed revamp of the site would also increase LAC’s compliance with the usability standard since principles of user- and task-centric design would be incorporated. LAC already meets several of the usability standard requirements, such as the application of the blue usability template.
  3. Interoperability: the deadline for implementing the interoperability standard is June 2015, and has been up to departments to implement in three phases (character encoding, mark-up language and feeds) with a fourth coming later (HTML data). Therefore, LAC should be on track to implement its third phase over the next nine months. The interoperability standard ensures GC web content is available across platforms, browsers and web apps.
  4. Mobile devices: the TBS standard on optimizing websites and apps for mobile devices was released in April 2013 and must be implemented by April 2016. This standard provides guidance on how to lay out the content, structure and design specifications for GC mobile content (sites and apps). The proposed LAC website revamp would allow us to make significant progress in meeting this standard.
* I would provide three options for the Deputy Head to consider:
  1. Maintaining the status quo (not advisable)
  2. Executing small, targeted changes on an ad-hoc basis (preferable to option 1 but not ideal)
  3. Executing a large-scale revamp to change the entire organization, layout and look-and-feel of the site, allowing LAC to comply with all TBS web standards and responding to the changing consumer behaviour and technology landscape. This would be the recommended choice in the briefing note.
* Following approval of the briefing note, I would develop a detailed project management plan (Task 2) and seek the necessary approvals.

1. Draft the briefing note using the attached template.

**Answer:** see separate briefing note document

**[Maximum 1,500 words for both a) and b)]**

**Knowledge of project management techniques**

**Task 2:**

Your briefing note to the Deputy Head containing recommendations on how to revamp the departmental website was approved with a request to proceed. As Manager, Web and Social Media, you have been assigned responsibility to lead this project. Your first task is to develop a Project Management Plan for your director and senior branch management, identifying key milestones and a process for successfully achieving them.

Prepare an outline of your Plan, which clearly indicates the major steps involved.

**Note:** While you are not expected to flesh out every section in detail, you must demonstrate your familiarity with management techniques for successfully implementing a project of this magnitude.

**(Maximum 1,000 words)**

**Answer:**

**LAC Web Renewal Action Plan**

The purpose of the plan outline below is to identify the key steps and milestones required to deliver a revamped LAC website, as requested by the new Deputy Head. Like the website itself, this project plan will be a living document and will be updated and refined as the project moves forward. All major developments will be communicated and shared with stakeholders as necessary.

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| **Steps and sub-components** | | **Milestones/deliverables** |
| **1** | **Strategy and alignment**   1. Develop and seek approval for web renewal business case (alignment with Business Plan 2013-16) 2. Establish roles, responsibilities and governance model 3. Outline vision and mission for web renewal (focus on users, tasks, mobile friendly, etc.) | Project management framework (this doc)  New governance committee or structure  Guiding vision and mission document |
| **2** | **Scope and requirements of project**   1. Align scope with direction from Deputy Head 2. Align scope with general GC online direction 3. Identify future functional and technical requirements (stage of implementation of TBS web standards, integration with social media account management software, IDM, Open Data, etc.) 4. Identify additional financial requirements and/or HR requirements and work with procurement, finance and HR depending on type of contract needed 5. Refine existing HR capacity to align with new site 6. Identify content development and refinement model and activities (inventory of pages, ROT reduction, orphan page exercise, etc.) | Additional human/financial resources engaged if required (casual, term, consultant, etc.)  Existing staff to register for additional training or development  Content inventory  ROT reduction plan and content refinement documentation |
| **3** | **User and needs discovery**   1. Identify users and needs (data from call centre, roundtables, outreach activities, etc.) 2. Identify top tasks (web analytics, call centre, etc.) 3. Prioritize importance of content (most important content gets priority for revamp) 4. Create web measurement framework (develop metrics, key performance indicators, etc.) 5. Prepare usability testing framework using the task and user info gathered above 6. Conduct usability testing of current site to establish a baseline (treejack, live moderated testing, etc.) | User and needs analysis documentation identifying top tasks, users and their needs  Adjust content inventory to reflect prioritization  Usability testing dashboard  Usability testing results |
| **4** | **Consultations**   1. Conduct internal consultations with relevant branches and business lines 2. Conduct targeted stakeholder outreach through roundtables, surveys, POR (if possible), etc. 3. Conduct online consultations through web surveys | Reports documenting findings of consultations and recommendations going forward |
| **5** | **Design and layout**   1. Develop homepage design and top-level (mega-menu) navigation based on users, top tasks and web stats (working with creative, editors and outside consultants if necessary) 2. Develop IA and navigation structure with same team 3. Develop wireframe for landing pages/hub pages with same team, and ensure consistent branding/feel between homepage and rest of site | Homepage mockups  IA and navigation structure mockups  Landing/hub page mockups |
| **6** | **Implementation and launch of new site**   1. Incorporate IA folder/structure changes in LAC content management system (CMS) 2. Begin migrating new homepage, hub pages and content pages into new template on the development site 3. Conduct pre-launch testing, quality control and bug fixes 4. Develop and launch internal communications plan for new website launch to familiarize employees 5. Develop and launch external communications plan for new website launch for external stakeholders | A series of technical, back-end milestones such as running tally of pages converted  New homepage for testing on dev site  Rest of site for testing on dev site  Internal comms plan approved and executed  External comms plan approved and executed |
| **7** | **Post-launch benchmarking and analysis**   1. Post-launch testing, quality control and bug fixes 2. Prepare for a short-term increase in feedback from internal and external audiences 3. Perform post-launch analysis of site using benchmarks and KPIs 4. Conduct post-launch usability testing and compare results to old site 5. Execute long-term, ongoing plan for continual improvement and content refinement | Report detailing post-launch feedback  Report detailing post-launch analysis using benchmarks and KPIs  Report detailing post-launch usability testing results  Long-term maintenance and continual improvement plan |

**Knowledge of the *Communications Policy of the Government of Canada* and associated guidelines and practices**

**Task 3:**

Policy requirement No. 18 of the *Communications Policy of the Government of Canada* deals specifically with the Internet and electronic communication.

1. Explain in your own words what this section of the Policy is trying to achieve.

**Answer:**

Policy requirement 18 essentially sets out the mission and vision for the GC using online tools to communicate and engage with the public. It acknowledges that the internet is a powerful (probably the most powerful) means to communicate with citizens who rely on government services every day. The importance of the internet as a two-way communication tool is also reinforced. It is not simply there to communicate information to citizens top-down; it should also be used to collect feedback and engage with and consult the public.

The requirement reinforces the fact that GC content has to be available online, all the time, and presented in a way that’s clear, logical, easy to find and written to be understandable. In many ways it mirrors the TBS web standards on accessibility, usability, interoperability and mobile devices; GC content has to be available online to all Canadians, regardless of their personal circumstances (disability, etc.) or what type of device on which they are accessing it.

There is also a heavy element in this requirement to policy adherence: the Federal Identity Program, Official Languages, the Privacy Act and others. It boils down to the fact that this requirement operates in tandem with a series of other laws and requirements, rather than independently in a silo.

The primary channels the requirement addresses are the internet (external web), social media and intranet. I suspect this will need to evolve to eventually include more information on social media (as it continues to become more and more popular and the GC branches out into newer platforms such as Instagram and Pinterest) as well as other methods of electronic communication such as push notifications, automated feeds, mailing lists and the like.

1. Describe what practices it is trying to discourage or eliminate.

**Answer:**

As I alluded to above, the requirement is trying to discourage the silo effect between different standards, policy requirements, laws and other such rules and regulations that GC organizations are required to comply with online. From a more legal and archival perspective, this requirement (and the rest of the Communications Policy of the GC) has to align with the Copyright Act, the Privacy Act, the Electronic Documents Act and the Personal Information Act. For LAC, I would guess this would have a number of linkages and interdependencies related to the organization’s role as the documentary heritage keeper of Canada and the memory of the GC and its institutions. Protecting and archiving information online is one of LAC’s key roles, so the manner in which it is guided to do this (via this policy, among others) would likely have big impacts on the way it runs its online presence.

I would also assume the requirement is trying to discourage different or scattered GC identities on the web and in social media. The push towards centralization and uniformity is strong, and not unique to Canada (Gov.UK, for example). By ensuring websites and social media accounts have a common look-and-feel and branding elements, the requirement makes sure citizens know when they are interacting with the GC online. In other words, it seeks to discourage confusion or other more nefarious activities such as fraud or identity theft.

**Note:** Demonstrate your understanding of the underlying objectives of policy requirement No. 18. Do **not** simply restate the policy requirement.

**[Maximum 800 words for both a) and b)]**

**Ability to communicate effectively and accurately in writing**

To be assessed throughout the exam