Dudley Knox Library Web Content Strategy

Monterey, California. Naval Postgraduate School

http://hdl.handle.net/10945/52385
What is Content Strategy?

**Person:** “So! What do you do?”

**You:** “I’m a content strategist.”

**Person:** “Oh! What does that mean?”

**You:** “You know how, on lots of the websites you go to, most of the information is hard to find, or inconsistent, or totally irrelevant, or just really bad?”

**Person:** “Yes, it is! In fact, my own company’s site is straight-up embarrassing. I’m so frustrated that no one is fixing it.”

**You:** “That’s what I do. I fix it.”

**Person:** “And how might I acquire some of this so-called ‘content strategy’? Because I happen to be the CEO of this company, and we have millions of dollars that I would like to pay you as soon as possible.”

(Halvorson & Rach, 2012, Ch. 11)
Dear Content Owners,

We developed this strategy to establish a cohesive, overarching plan for the library’s Web presence, and we hope it will serve as a touchstone for you as you create and maintain your Web content.

It's a practical plan that will help you answer questions like:

- How do I create a new guide or page?
- What system do I use?
- How do I ensure my content sends the right message?
- When and how do I maintain my content?
- Who can I ask for help?

This, and its companion document, the Style Guide, will give you the knowledge and tools you need to create useful, usable content that is in seamless alignment with the library’s communication goals and brand values.

Yours,

The Web Working Group
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(Halvorson & Rach, 2012, Ch. 7).
Core Strategy

“The core strategy is what connects all the other components of your content strategy together: It provides the all-necessary “guiding light” that keeps you moving in the right direction, no matter what might happen along the way.” (Halvorson & Rach, 2012, Ch. 7).

Curate a user-centered Web presence that helps our primary users easily find and access what they need to become successful learners, researchers, and educators.

This content will be updated soon.
Substance

Messaging
A prioritized set of communication goals that drives and permeates all aspects of the content and the design. Our key messages are how we want to portray ourselves to the world. Ensure that with every sentence you write, every image you select, you communicate these messages.

This content will be updated soon.

1. User-centered & responsive
   - Actionable
   - Practical
   - Empowering

2. Quality
   - Professional
   - High Quality
   - Reliable

3. Helpful & approachable
   - Friendly
   - Accessible
   - Trusted

4. Evolving & forward thinking
   - Innovative
   - Relevant
   - Proactive
Personality

“Personality is the mysterious force that attracts us to certain people and repels us from others.”

- Aaron Walter, Designing for Emotion

We, the Dudley Knox Library, have our own personality that comes across in our content. In order to build a relationship with our users, we must be consistent in our personality traits. We are developing a design persona to establish our brand traits.

This content will be updated soon.
Voice & Tone

Defining Voice

Our voice is a reflection of who we are. Through our voice, we can tell our users that we understand, appreciate, and value their roles here at NPS and beyond.

Here’s how we define our voice on the Web:

- Helpful but not overbearing
- Expert but not bossy
- Informal but not sloppy
- Actionable but not forceful

Defining Tone

Direct, yet conversational.

Our tone is a reflection of our audience’s emotional state. For example, they’re busy, task-driven, sometimes stressed students. We don’t want to convey a sense of superiority over them, or be blasé about the importance of the task at hand. Instead, we want to help, as a trusted friend would, by stepping in at their time of need with just the right information.
Structure

Channels
Ways through which content is delivered.

- **Public website:**
  library.nps.edu

- **Library applications**
  LibSearch
  LibGuides
  LibAnswers
  SFX
  ILLiad
  Classic Catalog
  Controlled Catalog
  LibComputers
  (computer availability app)
  Alumniproxy
  Libproxy
  Calhoun
  Internet Archive
  Database branding

- **Digital media**
  Sedna display screens

- **Intranets/extranets**
  Library Services Wiki page
  (https://wiki.nps.edu/display/libraryservices/Home)
  intranet.nps.edu
  Sakai (cle.nps.edu)
  NPS Video Portal

- **Print media**
  Brochures, flyers, handouts
  Signage/location names/maps

- **Bulk e-communication**
  (future discussion)

- **Online forms**
  Alumni Access
  Purchase Request
  Restricted Collection
  Course Reserves
  Library Feedback
  Special Collections Appointment
  Workshop Registration

- **WWW**
  Facebook
  YouTube channel
  Greta’s Gouge
  Google+ Profile
Types of Content

Purposes

- **Landing pages**
  Pages that provide “bite” and “snack” sized pieces of information, and offer links to “meals” associated with a group of related pieces of content (research guides, information pages, or help/FAQ pages)

- **Policy & Information pages**
  “About” or “how to” or “policy” pages that instruct and inform users on various library services, products, facilities or research tools. Example: Borrowing Privileges page.

- **Task pages**
  Pages that allow users to perform a task (e.g., search, browse, export, download, etc.) Examples: Library Catalog, Jane’s, Calhoun.
  These sites are not edited by Content Owners. They are either external sites (like our databases), or are edited/controlled by System Administrators.

- **Guides**
  Instructional tools designed for in-depth study or learning about a topic. Doesn’t have to be curriculum based. Guides link to external sites and resources. Ex: Physics Research Guide, Researcher Visibility, Copyright@NPS, Hotel Del Monte.

- **Help / FAQ pages**
  Content that answers questions by linking to where the answer lives on the Web (could link to one of our information/landing pages, a guide, wiki page, an external website, etc.)

Less content =
- Easier to manage
- More user friendly
- Costs less to create
Create New Content Workflow

1. **Choose the right CMS**
   Choose a CMS based on the **purpose** of your content. Is it a guide or an informational page, for example?
   If it’s unclear which CMS to use, contact libweb-help@nps.edu.

<table>
<thead>
<tr>
<th>Guide?</th>
<th>Not a guide?</th>
<th>FAQ?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use LibGuides</td>
<td>Use Liferay</td>
<td>Use LibAnswers</td>
</tr>
</tbody>
</table>

   - **Examples:**
     - Citation Styles
     - Physics
     - Researcher Visibility
     - Copyright @ NPS
     - Hotel Del Monte
   - **Examples:**
     - Alumni Access
     - Information Pages such as: Borrowing Privileges
     - Landing pages such as: About Calhoun, Special Collections & Archives, Tutorials
   - **Always link to existing content** when available rather than make new content.

2. **Email**
   Tell us the name of page or guide, purpose, scope (a brief outline of content), and where you envision your page within the information architecture.
   **You may receive a response with edits to your content from the WWG.**

3. **Edit your content based on WWG response.**
Page Templates

In order to offer a more seamless user experience across all our Web pages, we have outlined certain layout requirements for navigation and content pieces in templates. Each page must have the following elements positioned as shown. You can rearrange the format and display of the “body” of your content as desired, following the guidelines in the Style Guide.

The template “tells you everything you need to know about the content on a specific website page (or content module): the content objective, key messages, specific content recommendations, source content quality, and requirements for how to create and maintain the content.” (Halvorson & Rach, 2012, Ch. 8)

Pages that have the same purpose should have the same objective, key message, and look and feel. The WWG manages the development and use of page templates in various Content Management Systems (CMS).
Landing, Policy & Information Pages Template

- Friendly URL
- Breadcrumbs & Utility Links
- Standard graphic
- Page Title - “bite”
- Page description - “snack”
- Body - “meal” (or link out to “meal” if a landing page)
- Contact us box

**Friendly URL**
lib.library.nps.edu/borrow-renew-return

**Breadcrumbs**
Dudley Knox Library / Use the Library / Services / Borrow, Renew, Return

**Utility links**
- Ask a Librarian
- My Accounts

**Page title - “bite”**
Borrow, Renew, Return

**Page description - “snack”**
- Find out what you can borrow, how many, and for how long
- View check outs, due dates, and recalls
- Renew your library and Interlibrary Loan items

**Body - “meal”**
Borrow

With a library account you can borrow most books, media, and federal documents.

DL students can borrow books and request articles through their Interlibrary Loan account

**Contact us box**
- Information Desk
  - (831) 656-2947
  - circdesk@nps.edu
  - Floor Map
- You might also be interested in:
  - Borrowing Privileges by User Type
  - My Interlibrary Loan Account
  - Interlibrary Loan Policies
  - Course Reserves Policies
Guides Template

- Friendly URL
- Utility Links in banner
- Breadcrumbs
- Page title - “bite”
- Tab Local Navigation using approved labels
- Search box
- Body - “meal”

This content will be updated with LibGuide V2 requirements.
Help/FAQ Pages Template

- Utility Link in banner
- Breadcrumbs
- Page title - “bite”
- Search box
- Contact us box
- Date
- Body - “snack” or “meal” depending on if there are links out. Especially important for FAQ writing to be extra concise. Use bullets, short phrases, etc.
- Links & Files - “meal”
Target Audiences

Personas

- **Resident students**. Nate the Naval Officer.
- **Distance learning students**. Oscar the Overachiever.
- **Faculty**. Update coming soon

See our personas in our *Style Guide* for more info.

Priorities

- **Resident & DL students**
  top priority
- **Faculty & Research associates**
  next priority

*Both user groups are important.* Our website is geared to students, but we also mindfully serve faculty needs as well.

First *do no harm*, but if a compromise has to be made, students needs will be prioritized over faculty.
Mobile

Do not create a separate website for mobile. Responsive design is built into our CMSs to provide optimal viewing no matter what device is used for access.

- Responsive design will automatically adjust to sequentially display content from left to right and top to bottom. Consider the way you order your content since it will display differently on mobile than it does on desktop.
- Use the Liferay “Preview” function to see how your page looks on various devices.
- Because the Liferay preview may not be accurate, and there isn’t that function in LibGuides, you might want to preview on an actual phone or tablet.

Liferay’s Preview function helps you see how your page looks on various screens.
Navigation

Global Navigation
- Links in the global navigation are mainly reserved for our top user tasks: learning, research, and teaching.
- Global navigation is not a comprehensive list of links to ALL library pages
- Global navigation will appear on all pages except library applications (e.g., the catalog, research guides, ILL, etc.) “Double navigation” (global and page specific) is confusing to users. For those library applications, we will rely on our footer for navigation.

Breadcrumbs
- Put breadcrumbs on every Liferay page and within every library application, when possible.

Footer
- The footer contains required information such as our contact information, the Federal Depository Library notification, as well as redundant global navigation.
- Our footer functions as alternative navigation when the global navigation is not displayed on that page. It gives users who have gone out to one of our library applications, a way to access most of our top level pages.
- Include the footer on every page.
- It’s located above the NPS footer.
Opening Links

Open all links in the same window/tab

- Users should always be in control of the interface they are interacting with. Forcing new windows breaks the back button, and causes confusion, disorientation, and frustration. It also causes accessibility issues. However, there are rare exceptions.

When to force links to open in new windows

- Links that lead to non-html (ex. PDF)
- Link provides help
- Link may interrupt a process. Example: when filling out a form that has a link to relevant instructions.
- Link leads to image that takes a long time to load
- Other rare exceptions may be made for links to open in new tab/window. Content Owner must justify need to WWG.

For Sakai (online course sites)

We want the library link in the left navigation to open the library homepage in a new window/tab. This is the current default.

- But already established sites have the splash page or the library homepage opening in a frame. This is no longer best practice.
- It’s up to the librarian liaisons to contact individual instructors to see if they would be willing to let us change how the link opens.
- This rule does not apply to sites that prefer to have the more specific research guide as their library link, such as the Systems Engineering 311 Curriculum site.
Link Priorities

- **Link to task pages first** — pages where users can get things done. You can link to information (policy or about) pages from the task pages using a link label called, “Learn more about _____”
- **Use action-oriented labels** such as “Get an Interlibrary Loan account” instead of “First time users click here.” Link labels don’t have to mirror the exact name of the page they’re linking to as long as they tell the user exactly where they’re going.
- **Always link to the record** (the permanent URL or handle URI when the link destination is a pdf in a database or repository. For examples: ProQuest or NPS Archive: Calhoun.

Related Links

Don’t let users come to a dead end before accomplishing their tasks. We can give them alternate routes to get to the info they need.

- In LibGuides use the “Related Research Guides” box. Curate these to be highly relevant to the content of the page. Be very selective, and **limit the number to 3-5**.
- Include a “You might also be interested in . . .” section below the Contact Us box which links users to highly related pages. Be very selective, and **limit the number to 3-5**.

Contact Us

Information Desk

📞 (831) 656-2947
✉️ circdesk@nps.edu
📖 Floor Map

Submit a ticket to

if you need help adding or editing a Contact Us box on your page.
Link Labels

Good link labels help users more easily navigate the website. They serve as “bites” leading users to the “meal” content. They are generally task-based, meaningful to users, and short.

- Use the Accepted Terminology (see Style Guide) for link labels.
- Link labels are distinct from the actual name of the resource. Example: NPS Archive: Calhoun as opposed to Calhoun: The NPS Institutional Archive.
- Full resource names are more appropriate within the body of the text.
- Link labels should correlate with destination page title, but they don’t have to match. Launch and land rules outlined in Style Guide.

URLs & Page Titles

- Page titles and URLs should correlate.
- They need to make sense to users. Use natural language, not jargon/ random numbers/etc. Use the same rules that we apply to link labels.
- Flexibility is key - keep page URLs concise, when possible, and broad enough to accommodate changes we may make to the page title. For example, library.nps.edu/workshops-tours - page name is "Research & Writing Workshops, Library Tours, Thesis Briefs" - While not exactly matching, the URL still explains in users' words what is on the page.
- When creating a URL, let the default of the system apply. For example, hyphens might be imposed by the system, but if not, use all lowercase, no spaces, underscores, or capital letters.
Web Content Lifecycle

- Create/source new content
- Maintain existing content
- Evaluate content effectiveness
- Govern strategies, plans, policies, and procedures

(Halvorson & Rach, 2012, Ch. 9)
Along the way, keep reminding everyone (including yourself) of the benefits:

• More lasting website improvements
• Huge savings on content licensing
• Streamlined, more efficient workflow
• Vastly improved user experiences
• New types of cross-team collaborations
• More consistency in multi-platform content
• Better realization of overall business goals

These are the things you get when you put content strategy to work for your organization. What’s not to love? 

(Halvorson & Rach, 2012, Ch. 12).
Implement Changes Workflow

1. Problem or opportunity for change is identified.

2. The WWG gathers input from key stakeholders—their questions, concerns, suggestions. No decision is made at this point.

3. The WWG researches the issue and comes to consensus on the best option, carefully considering the ramifications of the change. Do the benefits to the user outweigh the resources and time it takes to implement? How does it impact workflow? How does it affect the rest of the information architecture? Is it sustainable?

4. WWG decides whether change is minor or major, which determines when change will be implemented. See definitions on next page.

5. WWG informs, receives feedback and approval from managers and informs key stakeholders directly impacted by the change, then notifies all staff of the change and the date of implementation.
   Example: if we change how boxes display in LibGuides, we would inform all LibGuide Content Owners of the change and the basic reasons why.

6. WWG implements change
Identify problem or opportunity for change

WWG gathers input from key stakeholders

WWG decides whether major or minor change

WWG researches issue & comes to consensus on best option

Webmasters inform stakeholders & notify staff

WWG implements change
Minor & Major Changes

WWG decides when to implement change. It depends on the magnitude of the change, and severity of the problem.

- **Minor changes** can happen at the quarter breaks or sooner. Examples: Small change to a link label name or adding a link to a subpage.

- **Major changes** need to wait for summer/winter breaks. Examples: changes to the information architecture (navigation, structure or organization) or global changes that affect display or functionality of the website or any other library application.

- **There are exceptions.** For example, if something doesn’t function properly and is a major usability issue, but it is a global feature, it would be fixed immediately, and staff notified.
Web Help & Communications

- Reporting errors/updates
- New content proposal
- Help with the CMS
- Requesting usage statistics for your page(s)
- Usability review of your content
- Any Web-related questions

Send email to
“Content needs a place of its own—a home base that facilitates cross-team collaboration wherever content is involved.” (Halvorson, & Rach, 2012, Ch. 9).

Defining ownership and roles helps answer questions like:

Whose job is it? Who’s responsible? Who owns it?

If we aren’t clear on who’s really doing what, we’re going to end up with duplicate tasks, unclear authority, and a general lack of quality control. So pay attention—this is important! (Halvorson, & Rach, 2012, Ch. 9).
Roles

**Content Owners (CO)** (also Subject Matter Experts)
- Own, manage, and create source content (text, graphics, audio, video) that clearly conveys user-centered purpose
- Work to enhance, edit, and reformat legacy and newly created content to conform to established Web content standards in the *Style Guide* and *Content Strategy*.

**Web Working Group (WWG)**
- Participate in planning and management of entire Web presence
- Set guidelines for the editorial tone, style, voice, and messaging of content with direct input from management
- Establish a style guide and content strategy
- Offer trainings on writing for the Web and how to use the Content Management Systems (CMS).
- Set and communicate Web content standards
- Ensure all content conforms to SEO requirements and best practices
- Actively seek stakeholder input prior to making decisions about content
- May help make the business case for content
- Oversee the development of content: Review content submissions, offer Web writing and design help, recommend improvements to content
- Own and facilitate the maintenance plan
- Ensure compliance with all requirements (DOD, DON, NPS, NPS PAO, Accessibility)
**Webmasters**
- Oversee the entire library Web presence
- Motivate and develop the staff’s ability and confidence in creating and maintaining their own content.
- Facilitate Web content planning
- Participate in Web strategic & operational planning
- Manage the website’s information architecture and design (structure, organization, navigation, look & feel)
- Analyze usage statistics and optimize findability through applying appropriate metadata, i.e., Search Engine Optimization (SEO)
- Work with Web related NPS departments (EIS, ITACS, PAO, Web Advisory Board, Global Design Group)
- Lead the WWG in accomplishing their objectives.

**People**
- **Content Owners**
  Individuals who are responsible for creating, editing, publishing, maintaining, and evaluating content on the website

**Full Content Inventory listing pages and Content Owners available at:**
[https://wiki.nps.edu/display/libweb/Content+Inventory](https://wiki.nps.edu/display/libweb/Content+Inventory)

- **Web Working Group (WWG)**
  WWG Members

- **Webmasters**
Governing Content

Ways we govern Web Content:

- Webmasters and/or the WWG will offer workshops/trainings to support the implementation of the guidelines we’ve set forth in the Style Guide and Content Strategy.

- Webmasters will annually take the NPS Site Manager Certification: https://www.nps.edu/technology/webbasedtraining/Auth/ModuleDetails.asp?moduleID=45

- All WWG members will take the CITI Ethics Training for Research with Human Subjects every 3 years so that we’re certified to conduct usability testing.

- Webmasters will establish and maintain good communication channels between groups.

- Webmasters, WWG members, and Content Owners will maintain and evaluate content regularly.
Maintain Content
Regularly scheduled reviews.

Regular review and evaluation of your content on a level that you can sustain over time is one of the keys to a successful website.

At a minimum, conduct reviews of your page(s) every year. The WWG will send you a list of your pages via a JIRA ticket as a reminder.

Regular review date:
“Winter break” - time between Fall & Winter quarters (end of December/beginning of January)

- Since this is a typical vacation time, plan your review accordingly. Try to pick dates that are between quarters for our students.
- The WWG will use JIRA to send a list of pages to individual Content Owners to review. This review reminder will be sent at the beginning of December.
- Webmasters and/or WWG members are available if you need assistance. We will provide consultations upon request.
Evaluate Content

Use the following checklist to evaluate your content.

Content Owners Checklist

☐ **Is content still useful and relevant to your users?**

☐ **Accuracy.** Have policies or processes changed? Do links work?

☐ **Currency.** Do new resources need to be added or deleted?

☐ **Usability.** Can the content be rewritten and improved based on the *Style Guide*?

☐ In alignment with our Core Strategy (p. 6)

☐ Communicates key messages (p. 7)

☐ Concise words, paragraphs, pages. Pared down to the essential message and not more.

☐ Clear, conversational, natural, jargon free language written to primary users

☐ Uses accepted terminology

☐ Good use of headers using statements, questions, or calls to action

☐ Good use of Bite, Snack, Meal format

☐ Good use of inverted pyramid style

☐ No Happy Talk

☐ Task pages first

☐ Good use of reusable content

☐ Uses templates

☐ Uses the default column sizes, fonts, font sizes, headers, colors, etc.

☐ Scannable formatting. Lists, bullet points, white space.

☐ Good use of links

☐ Good use of images, icons, and media

☐ Would like a usability review?
Webmasters Annual Site Evaluation

☐ Run a usage statistics report on page hits and user behavior. Flag pages with very low stats.

☐ Do a closer evaluation of these pages rating them on the factors (Last Update, Usage Statistics, Usability, etc.) in the Content Inventory (https://wiki.nps.edu/display/libweb/Content+Inventory) See Evaluate Content checklist (p.35).

After a full assessment of the page, work with the Content Owner to decide if

☐ Do we need to improve findability for the page, move it, update it, rewrite it, archive it, or delete it. If change is warranted, follow the Implement Changes workflow (p. 26).

Usage Statistics

☐ Be careful to read stats in relation to a benchmark for that page, not in relation to other pages. Also, stats should be taken into consideration with other factors such as the IA or the metadata to see if we can make changes to improve findability.

Usefulness/Relevance 1-5

☐ Is the content still useful and relevant to our current users? For research guides, we need to rely on the opinions of the Content Owners to supply us with this assessment.
Findability 1-5
How findable is it due to the information architecture (browse), or helpful metadata terms (search), e.g., Search Engine Optimization (SEO), Categories, Tags, etc.

☐ Check page title, keywords, and description for appropriate metadata.
☐ Do usability testing of the information architecture.
☐ Use the CMS’s search function.
☐ Do a Google search.
☐ Use the internal search engine.

Requirements
☐ Comply with DOD, DON, NPS, NPS PAO, Accessibility requirements.
https://wiki.nps.edu/display/libweb/Requirements

Appendix: WWG Guidelines

Go back to our Core!

- When making decisions always go back to our Core Strategy, Key Messages, and Personas to make sure what we do is in alignment with these cornerstone goals and the needs of our users.

Seamless Integration between Channels

- Strive to ensure seamless integration between all our channels and platforms in terms of look & feel, especially the header & footer.

- We may be limited by system constraints within each library application, but we’ll do the best we can to follow content strategy and writing for the Web guidelines within those systems as well.
Research, Review & Documentation

The WWG will regularly conduct usability tests of the website with representatives from our target user groups. We will collect and analyze the data to continually develop realistic and useful personas and scenarios. We will also stay up-to-date on research and literature in the field to promote current Web standards, new technologies, and innovation.

- Do usability testing with 5 users every year.
- After analysis, if change is warranted, follow the Implement Changes workflow (p.26).
- Use Web analytics in conjunction with usability testing data to make recommendations for improvement.
- Review Style Guide and Content Strategy annually. And when changes are made, provide the revised copies in digital format (.pdfs) to staff. Print copies available upon request.