

Making Links 2005  
Putting technology to work in the community sector  
Sydney 14-15 November 2005

W12 Policy and standards for website management – discussion notes for presentation

Prue Deacon, Information Specialist, HealthInsite Editorial Team, Australian Government Department of Health and Ageing  
[prue.deacon@health.gov.au](mailto:prue.deacon@health.gov.au)  
[www.healthinsite.gov.au](http://www.healthinsite.gov.au)  
phone: 02 6289 7505

#### Abstract

Website management is a team operation involving organisation managers, site managers and site developers. Having policies and standards ensures a common vision and consistency which can be maintained despite any staff changes. From the user point of view this enhances trust. This paper will focus on policy and standards for information published on websites. It will cover the areas of business plans, information quality, authentication, functional specification, documentation and maintenance.

#### Introduction

- Website management is a team operation – however it may be a very scattered team – eg CEO and Board, content writers, content managers, site developers.
- Some of these roles may be outsourced and offsite.
- The people in these roles change all the time and the commitment to the website varies.
- I am treating policy and standards very broadly as the documents that must exist in a well-managed site – ranging from the initial business case down to specific procedures manuals.
- Policy and standards documents are needed to make sure that there is a common vision for the site and that the site is maintained consistently, even if there are staff changes.
- If policy and standards are not written down in formal documents, each person may put their own slant on the purpose and running of the site. You could end up spending a lot of money on unwanted features or fail to meet user needs.

#### Formal site documents – the broad picture

- I have divided the types of documents into 3 groups, depending at what management level there is oversight.
- At the top level – being the concern of the executive management of your organisation and funders (maybe external) – there is the **business case** that gets the website started in the first place. This then leads into the **strategic plan** and longer term funding. Then there are the **annual business plans** (matched to the annual budget) and **annual reports**. At some point there will be a **major review** or evaluation leading to a new **strategic plan**, but possibly requiring the **business case** to be put again.

- The next level – involves the organisation managers who have responsibility for the site, and the site Board (or equivalent). At this level site **standards** need to be endorsed and **policies** determined whenever there is any conflict or perceived risk or significant financial consideration.
- The next level is hands-on content and technical management. The strategic plan and standards provide the framework. **Functional specifications** and **technical specifications** are required. In addition, **procedural documents** (manuals) are needed for the day to day work of developing and maintaining the site.

Draw a mind map for your own site

- There are lots of overlaps and cycles within and between these three levels. Each organisation and website will be different. Draw a mind map to identify which formal documents exist and where there are gaps
- Also think about people changes over the life of your website – has documentation been sufficient for smooth transfer of roles and duties – or has it been inadequate or an overwhelming mess.

Policy

- Policy is tied very much to business and strategic plans – at the very general level – What is this site for? Who is it for? How does it relate to the organisation's goals?
- Policy is also tied very much to the standards and procedures documents. In fact it may be incorporated into other documents. For example, a policy may become a standard and then it may be a check point in a procedure.
- Particular policies to think about: Quality assurance – who writes the material that goes on your site? What are the clearance procedures?; Advertising – will it be allowed? How should it be labelled?; Review schedule – how often will content be checked?

Standards

- Site standards are primarily concerned with the content of the site but with some overlap with technical requirements. For example, a site standard of Triple A conformance to W3C accessibility guidelines will impose technical constraints.
- You need to have your own standards document (or documents). However, if relevant local, national or international standards already exist, then it is a good idea to adopt them as part of your document (or referenced from your document).
- As an example, look at the principles of the international HONcode (the HON Code of Conduct for medical and health web sites) produced by the Health On the Net Foundation and available at [www.hon.ch](http://www.hon.ch). These principles are well worth considering as the basis for your own standards, even if you are not in the health sector.

Content/Technical issues

- The content/technical interface is a high risk area, especially if technical development is outsourced.

- Functional specifications are essential for major technical development and technical enhancements. They specify all the features that the IT systems have to support.
- Technical work is expensive so the functional specifications need to be clear and explicit.
- Once a system (or module) has been developed, content managers will need a procedures manual on how to use it – this will cover both the system and content issues.
- The technical developers should have their own versions – technical specifications and either descriptions of what particular modules do or lots of comments within the programming code.
- Documentation is often poor for procedures but it is at this level that policy often starts. Technical documents may need a layman’s version – to make sure that technical and content staff have a common understanding.

#### Maintenance

- Maintenance is vital for trust and credibility, but it is a major cost.
- There are two tasks: maintaining the content of your site and maintaining the formal documents that underpin it.
- It is important to have an annual review schedule which covers every page and resource on your site. You need to update or remove as needed. Where older resources are retained, they must be clearly dated. (This is for your legal protection as well as a user right.)
- Content and technical staff need to be alert for any problems or decisions that suggest a policy needs to be determined or standards and procedures to be adjusted. These need to be documented and then consolidated into the revised standards/procedures. (Too much documentation without consolidation will cause its own problems.)

#### Conclusion

- I have not covered every formal document that might be needed for your site.
- Good policy and standards documents will ensure that there will be a smooth handover whenever staff or managers change.
- Inadequate documentation means a risk of your site being at a standstill for long periods if there is a staff change.
- Focus on quality, not quantity, for your site content. Make time to keep those important documents up-to-date.

#### Useful links

A very useful tool for keeping up-to-date with website issues is the Victorian eGovernment Resource Centre newsletter “What’s new?”

[www.egov.vic.gov.au/whatsnew/whatsnew.htm](http://www.egov.vic.gov.au/whatsnew/whatsnew.htm)

Gerry McGovern’s site covers a range of content management issues with regular short articles <http://www.gerrymcgovern.com>

HON Code of Conduct (HONcode) for medical and health Web sites produced by the Health On the Net Foundation - although this relates specifically to health and medicine, the principles can be applied to other fields  
<http://www.hon.ch>

The HealthInsite standards also apply to most web publishing, not just the health area.  
[www.healthinsite.gov.au/content/publishing\\_standards.cfm](http://www.healthinsite.gov.au/content/publishing_standards.cfm)

Guidelines for Commonwealth information published in electronic formats  
<http://www.agimo.gov.au/information/publishing/formats> - January 2000 but currently under revision – very detailed, but may give guidance in particular areas