

# HUD's Web Management Operating Procedures

## Section 1: Roles and Responsibilities

### A: Roles of All Web Managers

#### Web Managers at HUD have 7 major roles:

1. **Writers/Editors/Communicators:** Act as editor-in-chief of the web products. Determine the focus, organize the content, write teasers, make sure we use plain language, manage the tone.
  - Know and understand our audiences.
  - Test content to make sure that each page has a clear purpose.
  - Apply writing standards and rules for plain language. Test content with someone who knows nothing about it before posting it.
  - Know that "less is more" on the web: Edit to make sure content communicates effectively for the intended audience.
2. **Consultants/Entrepreneurs:** Help managers figure out how to use the web to achieve their missions and reach their goals. Stir the pot and create business for the web.
  - Know HUD's mission and goals.
  - Get familiar with the Secretary's priorities and think about ways to use the web products to further them.
  - Find out what managers want to do, and take ideas to them.
  - Meet with your organization executives and Office and Division Directors. Inspire and excite them by showing them "what's in it for them."
  - Get on the agenda of management meetings. Tell them what you're doing, and invite their ideas. Show that you know what they do, and tell them how HUD's web products can help them do it better.
3. **Advocates:** Listen to our audiences - citizens, partners, employees.
  - Conduct focus groups, monitor email, collect the "good stories," get out and talk to the people.
  - Learn what our audiences want and need, and make sure our web products deliver. Invite audience groups to meet with you. Tell them what you're doing. Seek and observe their reactions.

- Go to homebuyer fairs, Neighborhood Networks centers, and other HUD events attended by the public - and talk to the folks. Keep your ears open for new ideas - you never know where they'll come from...evening news, conversations with neighbors, local talk shows. Email people who email you, and ask them for their ideas. People love to be asked for their opinions.
4. **Marketers:** Go out and tell our audiences what HUD has to offer.
    - Demo our web products sites at conferences, trade meetings, state fairs, home and garden shows - anyplace there are potential homebuyers, renters, community organizers, or HUD partners. Take advantage of marketing efforts of other HUD staff to piggyback web marketing. Seek successful marketers - pick their brains!
  5. **Teachers:** Teach staff about HUD's web products so they can help our customers use the site successfully.
    - Set up "drop in" sessions where staff can stop by and ask questions about how to use the websites. Set up mini-training sessions during lunch hour - showcase two or three great things about our websites.
  6. **Visionaries:** Look to the future. Think about new ways to use the web to serve HUD managers and our audiences. Inspire creativity in others with our own passion for what we do. Know what's going on across government with the web, and make sure HUD is a part of it.
    - Find out what other government agencies are doing, and figure out how we might do similar kinds of things.
    - Monitor HowTo.gov to learn the latest trends and news. Participate in the Web Content Managers Forum and in interagency web management task groups. Attend interagency workshops.
    - Read about new technologies - think how we can use them to serve citizens.
    - Spend time each week pondering this question: what could we do with the web to serve citizens better? Brainstorm with one another. Brainstorm with family and friends.
  7. **Managers:** Web content is a product that needs to be managed like any other product. Develop production plans, monitor progress, trouble-shoot problems, and measure success.
    - Plan and organize your time to be as efficient as possible. Use resources effectively. Identify potential problems and either address them or elevate them to the appropriate level, in a timely manner. Keep everyone who needs to know informed on progress. Make the hard decisions, based on policies, procedures, common sense, and "doing the right thing for Americans."

**B: Public Affairs Web Team**

The Office of Public Affairs (OPA) Web Team sets the direction for, trains, and coordinates HUD's web management organization and has overall responsibility for the content of all of HUD's web products. Each program area is assigned a liaison from the OPA Web Team who can help them vet ideas, solve problems, correct and post information on the website, and promote programs and web activities. OPA Web Team duties include:

- Recommend, interpret, and oversee implementation of the Department's web policies;
- Establish procedures and standards for HUD's web products;
- Provide direction, guidance, and training for organization Web Managers;
- Brief top HUD executives on HUD's web products and consult with them on how to use the web to achieve their goals;
- Research and develop long-term and annual strategies, goals, and objectives for the Department's use of its web products; and assess and report on performance;
- Develop, justify, and manage the technical support budget for the OPA Web Team and the Regional Web Managers (program offices provide their own technical support);
- Along with other appropriate staff, represent and coordinate the Department's involvement in interagency efforts and other outside efforts that impact the content of HUD's website;
- Coordinate the Department's web marketing and outreach efforts.

#### **Detailed list of the OPA Web Team's responsibilities:**

##### **General management**

- Develop, document, and communicate strategies and plans
- Develop, document, and communicate policies and procedures for web operations and publication
- Establish and manage priorities, both for long-term efforts and day-to-day web operations
- Establish management controls to ensure HUD's web products are managed efficiently and effectively, for example quarterly certifications.
- Develop and manage budgets for tech support for Internet/intranet, including writing all supporting documentation, statements of work, and OMB reports and defending the budget requests
- Provide routine direction and guidance to tech support contractors
- Develop and manage the annual operating budget for the web team
- Develop and implement web records retention policies and schedules
- Ensure that web management and web-related activities are incorporated into HUD's ongoing management processes, including Management Plan
- Develop and maintain liaison with key partner offices in HUD, including OCIO, OCHCO, and Field Policy and Management
- Participate in the Department's emergency planning activities and develop procedures for Continuity of Operations (COOP)
- Participate in other Department-wide and ad hoc initiatives, as requested.
- Represent HUD on interagency activities and initiatives, for example, the Web Content Management Working Group

##### **Product Management**

- Design HUD's website templates

- Develop web content for top level pages of www.hud.gov, hud@work, and archives.hud.gov
  - Write introductions, segues, and appropriate narrative to tie content together
  - Research and write new content.
  - Edit content provided by others
- Monitor web content developed by Headquarters and Regional Web Managers and work with Web Managers, managers, and staff throughout the Department to develop new content and improve existing content, to make content more visitor-friendly
- Coordinate with Regional Web Managers to develop standard content elements for state pages and regional hud@work pages
- Manage archives.hud.gov
- Develop, market, and manage new technologies.
- Coordinating webcast marketing and customer support.
- Develop and use analytical tools (for example, the American Customer Satisfaction Index, usability studies, link reports, webmap, Web Trends and other tools) to assess the effectiveness of HUD's websites and analyze and use the results to improve the websites.
- Manage posting rights for HUD's websites
- Act on any noncompliance with HUD's web policies and procedures, especially noncompliance with laws and regulations
- Establish priorities and translate content for espanol.hud.gov
- Research and develop new technologies that will increase the options for providing content in visitor-friendly ways
- Routinely review other websites, looking for new trends and ideas in web content

## **Organization Management**

- Plan and conduct Web Manager training, including counterpart meetings, conference calls, and written guidance
- Develop prototype job descriptions, performance standards, and crediting plans for Headquarters and Regional Web Managers
- Seek and communicate outside training opportunities for Web Managers (courses, conferences, speakers, etc.)

## **Customer Support**

- **Management Consulting**
  - Reach out to new political appointees as they come onboard and brief them on HUD's web products, offering suggestions for ways they could use them to their benefit
  - Routinely solicit opportunities to meet with managers at all levels to consult on ways to use the web
  - Generate opportunities to meet with managers to offer web-related suggestions for ways they can accomplish their mission.
  - Respond to requests from managers for consulting
- **Customer Service**
  - Establish/oversee Department-wide procedures for responding to web-related email
  - Respond to email addressed to Web Team
  - Respond to customer questions via the phone

- Respond to customer questions via personal visits
- **Marketing and Outreach**
  - Develop and implement marketing strategies to inform audiences about HUD's web products
  - Conduct routine staff training on web products
  - Conduct focus groups with HUD employees, partners, and citizens, to ensure that our web products remain responsive to their needs and to let them know about our products
  - Routinely communicate with HUD staff to keep them informed about what we're doing.

### **C: Headquarters Web Managers**

All Web Managers - both in Headquarters and the Field - have the same 7 basic roles. As Headquarters Web Managers, you are responsible for carrying out these roles within your organization, including any out-stationed components of your organization (such as Field Administrative Resources Centers, Homeownership Centers, etc.), and for participating in the Department's web management organization's initiatives and activities.

#### **What Makes You Unique?**

Headquarters Web Managers are unique in three ways:

- The content you manage is entirely within your organization.
- Most of you obtain or oversee your own technical support.
- You are responsible for all generic content on HUD's website related to the programs/activities of your organization

#### **Coordinating Content Within Your Organization**

All program office staff should work through their designated Web Manager to report problems, raise concerns, correct information on the website, and to vet new ideas and projects. Streamlining communication in this way helps to avoid duplication of efforts and confusion, and allows the web manager to spot trends and common issues across their organization. To develop content from your organization, work both from the top down and the bottom up.

- Meet routinely with your Principal Staff member or designee to brief him/her on web initiatives and accomplishments, to solicit input, and - most of all - to make sure you understand your Principal Staff member's priorities and goals.
- Ask to get on the agenda of staff meetings at all levels (Assistant Secretary down to Branch Chiefs and Team Leaders) several times a year to show them what's on your pages and get their ideas.
- As new managers are hired into the organization, brief them on their web pages and get their ideas about content they might want to develop.
- Keep all your managers informed on the status of certification efforts; ensure that they understand that it is their role to keep content current and accurate.
- Be sure to keep any out-stationed managers in the loop.
- Find ways to report your accomplishments to your entire organization. Ask for their ideas and suggestions.

- Conduct training for the staff in your organization, so they'll know what products are available and how to use them.
- Encourage managers to promote HUD's websites in their marketing efforts and public events.
- Seek opportunities to demonstrate HUD's website - and your pages - for our target audiences, including citizens.
- Ensure that your organization has documented procedures for clearing all content that goes on your web pages.

### **Obtaining/Overseeing Your Technical Support**

It is recommended that responsibilities for web content management and responsibilities for web technical support be assigned to separate staff, skilled in those distinct areas.

You have a few options for managing your technical support:

1. You can train HUD employees to do it.
2. You can hire contractors to do it.
3. You can purchase services from the OPA Web Team's tech support contractor.
4. You can do it yourself.

The OPA Web Team will arrange training for your technical support staff or contractors, to ensure they know how to use the content management system (for hud.gov) and templates (for hud@work).

It is your job to know and practice HUD's policies, publication standards and technical guidelines. If you have other staff or contractors who provide technical support, it is your job to make sure that they know and practice HUD's policies, publication standards, and technical guidelines.

### **Developing and Overseeing Generic Content**

By Departmental policy, generic content (content that is nationwide in scope) must be created in Headquarters; and local content (content specific to a geographic area or that only can be developed and managed locally) must be created in the Field. This is true both for the Internet and the Intranet.

Here are some of the implications of that policy:

- Any parts of the state page templates that apply to a specific program area - for example, the local CPD office information - must be coordinated with the Headquarters Web Manager, who will ensure that program managers agree with the content of the template. The local templates can be posted only after your approval.
- Your pages should contain content exclusive to your organization. Don't try to create your own mini HUD website (linking to content from other organizations) or create content that legitimately belongs to another organization.
- It is your responsibility to let the OPA Web Team know about new content you post AND to suggest appropriate Departmental pages where links might be established. Help us weave the content together so the public doesn't have to look in multiple places.

## **D: Regional Web Managers**

All Web Managers - both in Headquarters and the Field - have the same 7 basic roles. As Regional Web Managers, you are responsible for carrying out those roles within your region and for participating in the Department's web management organization's initiatives and activities.

### **What Makes You Unique?**

Regional Web Managers are unique in four ways:

- You strive to provide the same level of service to citizens, partners, and employees across the country; thus, you must develop and manage content - both on the internet and intranet - as a team. All of your content development is dictated by templates that you help develop, along with the other Regional Web Managers and the OPA Web Team. You work across organizations within the region to develop the content for your web pages.
- You are responsible for inherently local content on HUD's websites.

### **Managing Common Content**

As a Regional Web Manager, you are part of a team of Regional Web Managers across the country. Together, and with the OPA Web Team, you determine what your audiences want and need. Together, you organize categories of information to address their needs and write common text to explain the categories. Together, you make sure that all citizens, partners, and employees get the same high quality information no matter where they live. Together, you make HUD look good by ensuring that web content is consistent across the country. Everything you do, you do with the team.

Because you are physically located all over the country, you work "virtually," relying on email, online discussions, and phone calls to work with your teammates and get general direction from the OPA Web Team.

Because your territory encompasses two or more states, you rely on Web Coordinators to help you manage web content and perform your other duties. You have to be an excellent communicator to keep your Regional Directors, Field Office Directors, Web Coordinators, and other key players up-to-date on Departmental requirements and directions. You have to be an excellent manager to ensure that all of the states and offices in your jurisdiction receive the same high quality service.

### **Managing Inherently Local Content**

By Departmental policy, generic content (content that is nationwide in scope) must be created in Headquarters; and local content (content specific to a geographic area or that only can be developed and managed locally) must be created in the Field. This is true both for the Internet and the Intranet.

Here are some of the implications of that policy:

- Any parts of the state page templates that apply to a specific program area - for example, the local CPD office information - must be coordinated with the

Headquarters Web Manager, who will ensure that program managers agree with the content of the template. The local templates can be posted only after the Headquarters Web Manager signs off.

- Good stories, on the other hand, are typically "inherently local." They should be developed on state pages. You should let the appropriate Headquarters Web Managers and the OPA Web Team know when you post good stories, so they can link to them from the national pages.
- Your state pages on the Internet are the bridge to our partners' websites; so - within the templates - you will help our audiences find that local connection that will enable them to solve their own problems and achieve their own objectives. You play an important role in delivering "seamless services for citizens."

## **E: Web Coordinators**

Web Coordinators in the Field are the official points of contact - designated by the Field Office Director or Regional Director (in Regional Offices) - for web activities in that office. Normally, there is one Web Coordinator per Field office. In Headquarters, the Web Coordinators are points of contact within the sub-divisions of the program or operations office. So, for example, HQ Housing has several Web Coordinators.

Web Coordinators help the Web Managers handle the full range of activities associated with managing HUD's websites, staff training, and marketing and outreach efforts to promote HUD's web products. Field and program office staff work through their web coordinators to report problems, raise concerns, correct information, and vet new ideas for the web. In turn, Web Coordinators work through their Web Managers to bring these same issues to the attention of the OPA Web Team. These are just some of the important duties you carry out in support of HUD's web efforts:

- You help create, update, and manage the content of our websites. That includes helping manage the quarterly content certification process.
- You help teach HUD staff how to use the web, and our websites in particular, so they can do their jobs more easily and so they can help our customers find what they want and need, on our websites.
- You answer the email generated by our website, helping citizens and partners solve their problems and achieve their goals.
- You maintain regular contact with the person designated as the web-contact in each program area in your office, which would include CPD, Public Housing, Housing, and Fair Housing in a full-service office.
- You are "eyes and ears" for the Web Managers, helping them identify opportunities to use the web to accomplish HUD's mission and goals.

## **Getting to Know Your Duties**

Following are some of the specific duties that Web Coordinators perform:

- Develop, coordinate, maintain, and manage content for HUD's Internet and intranet websites in accordance with Departmental web policies and publication standards and other guidance from the OPA Web Team. Identify and work with points of contact in each of the program areas (Field) and offices/divisions/branches (Headquarters) who develop the content, and make sure they are aware of HUD's policies and procedures.



- Assist the Web Manager in coordinating the quarterly certifications, ensuring they are submitted in a timely manner.
- Brief the Office Directors and Program Directors on new content being added to the websites, so that they'll know what's available
- Help the Web Managers ensure the quality of the content on our websites by applying Quality Control standards before submitting it to the Web Manager
- Help the Web Manager and Office Directors inform managers and staff throughout the Office about the Department's web policies and publication standards.
- Serve as a point of contact within the office for questions about the Department's web policies and publication standards and raise issues to the Web Manager
- Make the Web Manager aware of web training needs of the staff and help address those needs
- Make sure that HUD staff performing customer service functions, in particular, know how to use HUD's websites to answer questions and direct citizens and partners to the information they need
- Make the Web Manager aware of marketing and outreach opportunities and help promote HUD's web products
- Respond to web-generated email in compliance with Department policies, and ensure that responses are timely and appropriate in tone and content
- Report "good stories" that might be included on HUD's websites - a single mom who bought her first home with an FHA loan, a community that was able to get its kids off the streets because of a HUD-funded community center, young people who were able to learn job skills through HUD's Step-Up or Section 3 programs.
- Offers suggestions to the Web Manager for ways to improve web management at HUD

## **Section 2: General Procedures**

### **A: Managing [www.hud.gov](http://www.hud.gov) and related microsities**

**Purpose:** HUD's website is a clearinghouse of information and services about homes and communities for citizens and for our current and potential business partners. It's designed to empower citizens and business partners by giving them what they want, when they want it, in ways that make sense to them, so they can solve their own problems and achieve their objectives.

**Audience:** The audience for our Internet pages is people outside of HUD - both citizens and partners.

**Management Strategy:** While responsibility for the design and overall organization of the site are centralized in the OPA Web Team, Web Managers throughout the organization control the content of their own sub-sections of the site.

The OPA Web Team manages the front page and other top level pages. Headquarters Web Managers develop content about their own program areas, which they post within their own directories. Regional Web Managers work together to develop standard content elements and then work individually to gather and post local specifics, for each state. All content appears in HUD's standard template, giving the website one "look and feel."

The OPA Web Team draws content from Headquarters sections and from state pages, through links, to form broad cross-organization content. Thus, all lower-level sections "feed" the top sections.

### **OPA Web Team Responsibilities**

- **Template Design:** The OPA Web Team designs the template used throughout the website. The design is based on a variety of factors, including
  - HUD's mission and strategic goals
  - Laws, regulations, policies, and other requirements
  - Customer feedback through webmail, customer satisfaction surveys, and focus groups
  - Changing needs and priorities of the Department
- **Front Page:** The object of the front page is to a) tell citizens about the most important services that HUD offers them, b) allow Public Affairs to tell the public about important HUD news, and c) teach all web visitors how to navigate our website.

Most of the front page of HUD's website remains static. Sections that change with regularity include:

- Photo rotator, which typically features Secretarial visits or initiatives, new web features and links, and frequently requested HUD services and information
- Featured News, which contains links to the most recent news releases
- In Focus, which features current news, recently released reports, hot topics, and Secretarial initiatives.
- "The HUDdle," HUD's interactive blog, which includes posts from regular bloggers, guest bloggers, video blogs, and special behind-the-scenes at HUD content.

Other front-page sections include

- I Want to.., which features the top tasks that most visitors want to accomplish when they visit the website
  - Four boxes to the right of the page, featuring the top Secretarial initiatives, HUD's Recovery Act website, and the program offices
- **Topic Level Pages and Audience Group Pages:** In most - but not all - cases, the topic level pages and audience group pages are managed by the OPA Web Team and are located in the "root" directory. The reason for this management policy is that no single office or organization in HUD "owns" a topic or audience. In fact, information about a topic or for an audience may come from many parts of HUD. OPA Web Team members organize and layout content, write segues, incorporate links to program and state information, and link to other related info on outside websites.
  - **State Pages:** The OPA Web Team oversees the design and implementation of the state pages, working with the Regional Web Managers.

### **Headquarters Office Pages**

- Headquarters offices each have a section of HUD's website. In their sections, they post all appropriate information, applications, and services relevant to that program area, exclusively.
- Headquarters content must be Department-wide or generic in nature.
- The OPA Web Team links program content into the Departmental pages, as appropriate.
- The OPA Web Team oversees the Headquarters office pages, including troubleshooting their problems.

## **State Pages**

- One of the most important objectives of HUD's web products is to ensure that all Americans have access to consistent, high quality information and services, no matter where they live. Thus, at the local level, HUD's website is organized by state; and we ensure that the same information is available on every state page. The state pages supplement the national pages by providing specific local information. Where appropriate, links are created to Headquarters content that is generic or Department-wide in nature.
- Regional Web Managers work with the OPA Web Team to develop the standard content templates for the front page, each topic level page, and - where consistencies can be found - sub-topic level pages.
- Links back and forth tie national and local content together in ways that make sense to the audiences.
- Changes to state page templates are made only after vetting among the Regional Web Managers and with the approval of the OPA Web Team.
- Once the content templates are agreed upon, they are "locked down." Everyone provides the same information, in the same order, using the agreed upon terminology, making it easy for the web audience to locate comparable information from state to state, in terms that do not vary.
- The OPA Web Team is responsible for overseeing the state pages, including troubleshooting problems.
- Regional Web Managers are responsible for developing and managing the local content on state pages.

## **Microsites**

- Management often requires that a separate site off of hud.gov be created to highlight or promote a particular aspect of the overall website or HUD initiative. These microsites share the same policies, procedures, publication standards, and management controls as [www.hud.gov](http://www.hud.gov). The microsites are managed by Public Affairs with content input from the related program areas.

## **B: Managing [espanol.hud.gov](http://espanol.hud.gov)**

**[Espanol.hud.gov](http://espanol.hud.gov)** is the Spanish version of HUD's most-used and most-requested web pages. While it is not a complete mirror of the English website, it includes the content that is most used by citizens to buy a home and find rental help.

## **OPA Web Team's Duties**

**The OPA Web Team manages [espanol.hud.gov](http://espanol.hud.gov), including:**

- Establishing translation priorities
- Translating pages into Spanish
- Managing marketing efforts
- Developing the annual budget
- Establishing and monitoring management controls to ensure websites are in synch
- Responding to email and questions in Spanish
- Troubleshooting problems

### **Web Managers' Duties**

Web Managers are responsible for notifying the OPA Web Team when significant new content has been created or important content has been updated. The OPA language specialist will translate content if it falls within established priorities. Any translations not provided by OPA's web team will need to be reviewed by OPA before posting. If needed, translations will be edited in order to maintain the overall consistency HUD is striving for within its multilingual web content. When new pages are developed, notify OPA, who will determine if they should be translated. If content that has been translated is changed significantly - updated or expanded - in English, notify OPA to review the updated translations for [espanol.hud.gov](http://espanol.hud.gov)

### **C: Managing the Intranet**

HUD's intranet is our internal website, available only to HUD employees. Like the Internet sites, the intranet has a standard template. Headquarters information is organized by Office. Field Information is organized by topic, and standard topics are used across the country.

Employee surveys, focus groups, and usability studies make clear that employees feel this way about the intranet:

- They want it to be simple
- They want it to be lean
- They don't want it to duplicate the Internet websites
- They want it to provide employee information about jobs, pay, benefits, and services; and they want it to provide basic information and tools that they need to do their jobs
- They want it to help them know what other employees are doing

HUD's intranet is a management tool and not an employee bulletin board; thus, you'll need to be thoughtful about the tone and content of your pages.

Even though it is internal - only HUD employees can see it - it's still extremely important that everything on those pages is current and accurate. It's your job to make sure they stay that way.

Keep it simple; keep it clean; keep it employee-focused.

### **OPA Web Team's Duties**

- **Template Design:** The OPA Web Team designs the template that is used throughout the website. Like the Internet front page, the design is based on:
  - HUD's mission and strategic goals

- Laws, regulations, policies, and other requirements
- Employee feedback through webmail, customer satisfaction surveys, and focus groups
- Usability principles
- Changing needs and priorities of the Department
- **Front Page:** Like the Internet front page, the intranet front page is designed to showcase the most important information and services that employees need to do their jobs and teach employees how to navigate the website. The OPA Web Team manages the front page and some other topic level pages.
  - **Features**—2-3-line teasers on topics that affect all or most employees. May remain on the front page for up to a week.
  - **Highlights**—one-line teasers on topics that affect most employees. May stay on the front page for up to 2 weeks.
  - **Tools**—quick links to commonly used tools.
  - **What's New at HUD**—News releases and news clips about HUD.
  - **FYI**—For management priorities that need to be highlighted for a prolonged period of time.
  - **Drop-down menus**—Should contain only common links that most employees use
- **Department Level Pages:** For the most part, Department level pages are managed by the organization having the most functional responsibility for the subject matter.

### Headquarters Office Pages

Headquarters office pages on the intranet are aimed at providing specific program or function news, tools (such as systems) that employees need, and contacts to help employees resolve problems and do their jobs.

### Regional Pages

Regional pages provide important local information to help Field employees do their jobs. There are 3 regional topics on the intranet:

- Local travel
- Customer service
- Library

### D. Social Media

- **YouTube**—The Department maintains one official YouTube channel. Any video posted to YouTube must be submitted through the Office of Public Affairs
- **Twitter**—The Department maintains one official Twitter account, plus accounts for some of the Regional Public Affairs Officers, Regional Public Affairs Officers may request Twitter accounts through Public Affairs Headquarters.
- **Facebook**—The Department maintains one official FaceBook page, managed by Public Affairs.
- **Blog:** The Department maintains one external blog. The Office of Public Affairs writes the blogposts and solicits guest bloggers from the program areas, the regions, and experts outside of HUD. Any HUD employee may submit a blogpost for consideration. Blogposts should be submitted through the program office or regional web manager and should follow the same vetting process as other web content.

## Section 3: Management Controls

### A: Quarterly Content Certifications

HUD's quarterly certification process helps us ensure that all content is current and accurate and in compliance with laws, regulations, and policies. While managers are responsible for the certifications, the Web Managers should assist managers to coordinate the process and to make any changes that are needed.

#### About the Certification Policy

- In 2001, the Deputy Secretary issued the policy requiring each organization head to certify, in writing, each quarter that the web content for which that organization is responsible is both current and accurate. Certifications for are due:
  - January 1,
  - April 1,
  - July 1, and
  - October 1.
- This certification requirement applies only to all web content, including content on [www.hud.gov](http://www.hud.gov), hud@work, and other HUD websites. Managers should establish procedures to ensure that all web content is reviewed and updated routinely, to avoid delays just before certifications are due.
- Certifications should include:
  - Navigational pages
  - Documents
  - Data available without password protection
  - Discussions and real-time chats (only need to certify that they are being used and maintained by the owner)
  - Webcasts (only need to certify that they should continue to be on the website)
  - Mailing lists (only need to certify that they are still being used and maintained by the list owner)
  - Calendars (only need to certify that they are still being used and maintained by the owner)
  - Links (must be working, must go to the site intended)

#### Process

- Most organization heads hold their subordinate managers responsible for the web content they generate.
- At least one month prior to the end of the quarter, prepare an email from the organization head to subordinate managers reminding them that certifications are due. Establish a deadline - normally at least one week before the end of the quarter - for the subordinate managers to submit their own certifications to the organization head. Since you must do both internet and intranet, you may want to stagger the deadlines, doing the reviews of the intranet the first month and the reviews of the internet the second month. That way, you can complete all changes in plenty of time for the certification deadline.
- Collect the certifications from the subordinate managers, and prepare the certification memo for the organization head so that it can be submitted by the due date. If subordinate managers do not meet the deadline, follow up and/or raise the

problem to the attention of the organization head. The standard language for the memo is:

MEMORANDUM FOR: The General Deputy Assistant Secretary for Public Affairs

FROM: (Assistant Secretary or Regional Director)

SUBJECT: Certification of website content

This is to certify that the website and kiosk content for which my organization is responsible is both current and accurate as of the above date. In addition to reviewing website content, my organization has reviewed all calendars, mailing lists, online discussions and chats, and webcasts to ensure that they are still viable and needed: action has been taken to eliminate those that are no longer needed.

- You may fax the certifications to Public Affairs at (202) xxx-xxxx or hand-deliver them to Room 101xx. Be sure to fax a copy of the signed certification memo to the OPA Web Team at: (202) xxx-xxxx or hand-deliver to Room 10142.
- The OPA Web Team will monitor certifications and report any outstanding certifications to the GDAS for Public Affairs.

### **B: Posting Rights**

The OPA Web Team is responsible for granting and managing posting rights for HUD's web pages in a manner that protects the security of the websites.

#### **Posting Rights in Headquarters**

For the Internet website, each of the program offices and major support offices may request one posting right per major organizational unit (Deputy Assistant Secretary level). Thus, the allocation for Headquarters organizations are as follows:

- Housing: 6
- PIH: 5
- CPD: 4
- FHEO, OCHCO, OCIO, CPO, CFO, CIR, EEO, OGC, OIG, Lead Hazard Control, ODOC: 2 each
- ALJ, Board of Contract Appeals, Faith Based and Neighborhood Partnerships, OSDDBU, FPM, and PDR will get support from the OPA Web Team technical support contractor.

For hud@work, organizations may have twice the number of posting rights that they have on www.hud.gov.

#### **Posting Rights in the Field**

For hud.gov, Regional Web Managers use contract support for posting.

For espanol.hud.gov and for hud@work, Regional Web Managers are supported by the OPA Web Team's technical support contractor.

#### **General Rules about Posting Rights**

- Posting rights are issued to individuals and may not be shared for any purpose.
- Any posting activity that results in losing files, making changes in directories other than those authorized, security violations, legal violations, rendering the websites or part of the websites unworkable, or any other result that has a negative impact on the operation of HUD's websites will be dealt with promptly by the OPA Web Team and, as appropriate, the OCIO, in consultation with the organization manager. Remedies may include required training, temporary suspension of posting rights, or permanent suspension of posting rights.
- All Web Managers are expected to know and abide by the policies and procedures for HUD's websites.

### **C: Operating in emergencies**

HUD's websites could play a critical role in emergency situations, getting information out to citizens, business partners, and employees about operations and procedures. Every Web Manager needs to know what he/she is expected to do within the organization, in case of emergencies. Every Web Manager needs to suggest possible impacts on, and uses of, the web in emergencies, to his/her organization head, to help ensure that his/her organization's emergency plans address web operations.

- **Departmental Information and Guidance on Security and Emergencies** - Important information about security and emergencies will be posted on HUD's Intranet (hud@work) by the Office of Security and Emergency Planning (OSEP). It will appear under the topic: "Emergencies and Security." That will serve as the primary information source for HUD employees about security and emergency procedures and protective measures. Any local emergency and security information posted on regional hud@work pages will be linked to the national Emergencies and Security page, so that all employees have just one place to look for this kind of information.
- **Local Information and Guidance on Security and Emergencies** - Regional Web Managers may create local Emergencies and Security pages on their Regional hud@work pages, provided that they coordinate all content with OSEP in advance and that all content is approved by the Regional Director, in advance. They must ensure that local information is linked to the Emergencies and Security page on the Departmental hud@work site. Content on local hud@work pages must be strictly local and must not duplicate information already on or appropriate for the national site.

### **Specific Duties of Web Managers**

- Be familiar with the Department's procedures for posting content during emergencies,
- Work with your COOP representative and others in your organization to make sure they are aware of emergency posting procedures and that any other web aspects are addressed.
- Maintain a current list of phone numbers, home email addresses, and other contact information for key managers in your organization, Web Coordinators, fellow Web



Managers, Public Affairs Officers or Coordinators, and any others who you might need to contact in an emergency.

- Inform/train Web Coordinators in your organization on procedures for posting information and other emergency plans related to the web.

### **Posting in Emergencies**

In the case of a major emergency, information related to the emergency can be posted to HUD's website remotely.

- a. HUD's Web Team may post information on the front page of HUD's website or - in the case of local emergencies - on the front page of the "state" pages to inform employees, business partners, and/or the public about changes in the Department's operations. The following policies and procedures will be used in emergency situations.

### **For Level 1, 2, 3, or 4 emergencies in Headquarters and Level 4 emergencies in the Field:**

- Information to be posted should be submitted for approval by telephone, in person, or in the most expeditious way possible to the Secretary, the Deputy Secretary, the Chief of Staff, or - if none of those officials is available - to the top official specified in the succession plan documented in the COOP. A concurrent alert should be sent to the Assistant Secretary for Public Affairs or his/her designee.
- If the emergency affects one or more Field offices, information should be coordinated with the Assistant Deputy Secretary for Field Policy and Management or his/her designee before it is submitted for approval.
- Once approved by the Secretary, Deputy Secretary, Chief of Staff, or top HUD official designated in the COOP, the information will be submitted to the Office of Public Affairs for content clearance. The Assistant Secretary for Public Affairs will designate - in advance - specific staff that may authorize this clearance.
- The Assistant Secretary or designee will email the information to be posted to the Departmental Web Management Officer who will post the information or designate another Web Manager to do so.
- Only the Assistant Secretary for Public Affairs and/or designee and the Web Management Officer have the authority to post emergency updates. The Web Managers will post information only with the authorization of the Assistant Secretary for Public Affairs (or designee) or, if the Public Affairs staff is not available, with the personal approval of the Secretary, Deputy Secretary, Chief of Staff, or top HUD official according to the COOP. The Web Management Officer or designees will not post information provided through third parties.
- The Web Management Officer can post from anywhere in the country, as long as they have access to a computer with Internet access and as long as HUD's web servers are operational at the primary or secondary locations.

### **For Level 1, 2, and 3 emergencies in the Field:**

- The Regional Web Managers may post information for employees, partners, and/or the public about the status of operations or actions to take related to local emergencies on hud.gov. Information to be posted on hud@work may be submitted through Fieldtrak as a "Now" priority.

### **The following approvals and notifications are required:**

- For Level 1, Level 2, or Level 3 events, the Regional Director (RD) must approve the information before the Regional Web Manager can post it. The RD must inform the Assistant Deputy Secretary for Field Policy and Management, the Assistant Secretary for Public Affairs, and the Director of the Office of Security and Emergency Planning about the posting. For Level 1, 2, or 3 events, if the Regional Director is unable to reach the Regional Web Manager or his/her designated back-up, the RD may contact the Departmental Web Management Officer directly.
- For Level 4 events in the Field, approvals will be the same as for Headquarters emergencies, outlined above and documented in the COOP.

### **D: Content Coordination**

Web Managers need to ensure that the content they post has gone through all required clearances. Web Managers should work with their organization heads to establish clearance processes, and Web Managers should train their Web Coordinators to ensure that all clearance processes are implemented.

### **Required Coordination**

- Assistant Secretaries and Regional Directors are responsible for establishing and communicating procedures within their organizations to ensure that all content submitted to the Web Manager has been properly coordinated and approved.
  - Web Managers should meet with their organization heads to develop and document these procedures and should assist their organization heads in communicating the procedures to all involved.
- All website content of a political or policy nature must be coordinated through the Office of Public Affairs before it is posted. It is the responsibility of the appropriate Principal Staff member or Regional Director to ensure that this occurs.
  - Web Managers should meet with their organization heads to develop and document procedures and should assist their organization heads in communicating the procedures to all involved.
  - Web Managers should be on the lookout for new or revised content that may be of a political or policy nature and ensure that it has been vetted appropriately before posting.
- Organizations who want to create content that crosses program or organizational jurisdiction must be coordinated with the other organization(s).
  - Web Managers should be assertive in identifying content that may cross jurisdictions and in coordinating with - or at least informing - the Web Managers of those jurisdictions about potential overlap, before the content is posted.

- Organizations involved in cross-agency efforts must coordinate with the OPA Web Team.
- Organizations creating new web-based applications must coordinate with the OCIO (including the Test Center) and with the OPA Web Team.

### **E: Brand Infringement And Fraud**

Once in awhile, we become aware of a website that appears to be a HUD website - by its content or by its look and feel or by its URL. Though we may wish these websites wouldn't exist, they are perfectly legal...**as long as they do not represent themselves as being an official HUD website**. If another website appears to represent as an official HUD website, you should alert the OPA Web Team. The Web Team will review the site and, if they agree, forward it to the General Counsel for action.

### **What to Look For**

- No organization, outside of HUD, can use the official HUD seal. If the HUD seal appears on another website and the seal seems to be used to indicate HUD sponsorship, report it.
- If a website looks like a HUD website - maybe it has a URL with "HUD" in it or it talks about a HUD program, check to see if there is a disclaimer somewhere on the front page. Normally, they are at the bottom. As long as there is a disclaimer that says the website or organization is not officially affiliated with HUD, it is OK. However, if it appears to be a HUD site and has no obvious disclaimer, then refer it to the OPA Web Team.
- There is growing concern about the new technical trick called "phishing" - where a website is made to look like an official website for the purpose of defrauding people (collecting personal information, etc.). Be on the lookout for any websites that might be trying to use phishing; report them immediately.

### **F: Data Accuracy**

**Requirement:** Section 515 of the Treasury and General Government Appropriations Act for Fiscal Year 2001 and guidance from OMB requires agencies "to ensure and maximize the quality, objectivity, utility, and integrity of information disseminated by Federal agencies." OMB policy memo M-05-04 says that agencies should take reasonable steps to ensure the quality of information by:

- "Clearly identifying the limitations inherent in the information dissemination product (e.g., possibility of errors, degree of reliability, and validity) so users are fully aware of the quality and integrity of the information or service,
- Taking reasonable steps to remove the limitations inherent in the information, and
- Reconsidering delivery of the information or services.

This applies to content, data, and links.

### **What Web Managers Must Do**

- If inaccurate data is found on the website, the Web Manager needs to work with the appropriate office to correct the data as soon as possible.

- If people who use HUD's website report potential inaccuracies in data that is presented on the website, via the webmail system, forward the message to the designated email box maintained by the Office of Chief Human Capital Officer, for processing: quality\_info@hud.gov.
- When putting up new web content - especially content that presents or includes data - make the manager aware of the OMB requirements and include appropriate clarification or disclaimers.
- When evaluating new links or reviewing existing links to outside websites, consider the requirements of the OMB policies and include appropriate clarification or disclaimers.

### G. Using Web Analytical Tools

The OPA Web Team has developed a number of tools to help Web Managers and Web Coordinators improve the website.

- **Statistical reports** (Webtrends): Statistics for HUD's websites are published monthly, normally by the middle of the month. Statistics can be very useful in
  - Promoting the website with both internal and external audiences.
  - Identifying navigation problems - if you think a page should be getting more use than it is, then maybe you need to change the navigation to that page, so it's more prominent
- **File management reports** - these reports help Web Managers identify files currently on the production server. You can use this report to find files that should be removed or archived.
- **WebLink reports**: WebLink reports help identify broken links.
- **American Customer Satisfaction Inventory (ACSI)**: The ACSI helps us get feedback from citizens and partners who use our Internet websites, about their perception of the sites. Customer satisfaction scores help us know our audiences' perceptions about our sites. They may or may not actually reflect how well audiences can use our sites.
- **Usability tests**: usability testing helps us know what our audiences actually do on our sites. These tests can help us determine where we've got navigation problems or wording problems.
- **Google Statistics**: <Need a blurb>

H. Social Media: [see social media policy](#)

# Appendix A: How To Conduct A Focus Group

## Why

Focus groups do two things: they help us tell our target audiences about our websites, and they help us get feedback from our target audiences about what works - and what doesn't work - on our websites.

## When and Where

It's best if focus groups are planned in advance. But focus groups also can happen on the spur of the moment, given the right circumstances. If you find yourself in the middle of a group of people who have a little time on their hands, don't hesitate to pull out your laptop or show them a few printouts of HUD web pages and see what they have to say.

If you're scheduling a focus group, be thoughtful about time and place. What time of day would the target audience be available and most receptive to the effort? For example, you might do best with a focus group for citizens in the late afternoon - after work - or in the early evening or on weekends. HUD employees are most likely to welcome a focus group during the day - during work hours or at lunchtime. You might be able to schedule a focus group for partner organizations in conjunction with other planned efforts, such as meetings or conferences.

Find a comfortable place to hold the group - a place that is conducive to informal exchanges among a small group of people. If possible, avoid a classroom setting. Sitting in a circle is far more effective.

## Find Your Participants

Again, you can do a terrific focus group spontaneously, by just asking people around you to give you their opinions. People love to be asked for their opinions! But if you'd like to plan ahead, there are a number of ways to find participants.

**Citizens** - if you want to do a focus group for citizens, try to meet them where they are.

- Libraries are a great place to do focus groups because most libraries have computers with Internet access. Ask the librarian if you could schedule a focus group some early evening, put up signs, and see what you get.
- Or maybe you can identify some citizen group that meets regularly - a resident advisory board of a PHA, a community group that meets in a local community center - and see if they'd like to have you come in to do a demo of HUD's website. Then, while you're at it, you ask some questions.
- Street fairs, home and garden shows, and community events are great places to set up shop. You don't even have to use a computer - just print out a few pages of the website to show them. And don't forget to take along a stack of website brochures, so they can take something with them.

**Partners** - If you want to target a partner audience, you can try a couple of approaches.

- Partners actually will respond to invitations - so ask your program staff to give you a list of partners, call or email them inviting them to your focus group, and you'll probably have a pretty good turnout.
- Or another alternative is to go to them. Find out when and where there are meetings that draw partner organizations - conferences, etc. - and ask to have a table and/or some time to show HUD's website.

## **Employees**

- The easiest thing to do is put up a sign inviting employees to a focus group during lunch - you're bound to have some volunteers.
- But the best course of action is to get your organization head to agree to let you invite a few employees to join you, during work hours, for a focus group.

## **Conduct the Session**

- Again, focus groups work best if they're informal. Put everyone at ease. Begin by introducing yourself and telling them why you're here - to find out what they think about HUD's website. Explain that their input help us make the website better. Assure them that we want them to be open and honest. If they don't like something or think we could do something better, tell us. Of course, we'd also like to hear what they DO like; so we'll know what to leave alone. Depending on the circumstances, you may want to ask the participants to introduce themselves.
- Start by giving a brief overview of the site or section of the site that you want them to review. Briefly explain how it's organized, show where some of the links go, and give them enough flavor and background for the site/pages that they can understand.
- Then, begin to ask questions. What questions you ask depends on the setting, the audience, and your objective. But you should think about your questions before you begin the focus group - plan ahead. For example:
  1. What is the first thing you notice about this web page?
  2. What captured your eye on this page?
  3. What is the first thing you'd click on this page?
  4. Knowing what you know about this website, do you think this page does what we want it to do? If not, why not? If so, what makes it succeed?
  5. What about this site would make you come back?
  6. What about this site turns you off?
  7. What did you think you might find on this site that you didn't?
  8. What did you find that surprised you?
  9. If you were in charge of promoting this site, what would you brag about?
  10. If you were going to change something about this site, what would it be?
- As a rule, keep your questions open-ended to promote discussion. Questions that can be answered with "yes" or "no" typically do not inspire discussion.
- Plan to ask about 5 questions, and have those 5 questions in mind before you begin.
- Manage the group - but don't inhibit it. Make sure you get answers to your 5 questions, if they were important to you. But follow the direction of the group. They may take you off into tangents you hadn't planned - and you might learn something unexpected.
- Make sure you understand what is said to you. If someone says something ambiguous or unclear, try to restate it. "Let me be sure I understand what you're saying. You're saying X, Y, Z - is that correct?"

- Allow participants to talk with one another. Sometimes the best feedback you'll get will come from eavesdropping on their conversations, even if they go off in tangents, rather than relying solely on direct responses to your questions.
- Don't let the group turn negative. "I don't like this" and "I don't like that" can cut off discussion or lead to non-productive debate. If you find the group becoming negative, change the subject. Or force them to focus on what's positive: "OK - now tell me something you like about this page...what should we keep?"
- Be sensitive to the timing of the group. Normally, you'll know when they're winding down. Pace yourself so you're sure to cover what you want to cover before they get tired. When they do get tired, thank them, end the group, and invite them to send any additional thoughts or ideas to you via email (give them your card) or on the phone.
- Be sure to take notes. Don't count on your memory to document what group members tell you. If you find it hard to both lead the group and take notes, take someone with you to do the note-taking.
- Be sure to thank them! They have just given you the gift of their time and energy, so be sure to extend your appreciation.

### **After the Focus Group**

Share what you've learned with everyone in HUD who could benefit - the OPA Web Team, other Web Managers, Web Coordinators, and managers within your organization. Look for trends and innovative ideas, and think how you could use them. Identify anomalies and test those in subsequent focus groups. As a rule, it's a good idea to do several focus groups, in which you start to see themes, before you take action to make a change in content. Sometimes focus groups can get off-track. But if you do 3 or 4 groups, and most of them say the same things, then you've got a pattern you can use.

## **Appendix B: Conducting Staff Training**

Training staff to use the web - and HUD's websites - is one of the most important activities of Web Managers and Web Coordinators. Following is an outline that might help you conduct training for your staff.

### **Introduction and Overview**

- Introductions - introduce yourself and all the participants. Don't assume they know one another.
- Tell them what you're going to do. Run through your outline so they'll know what to expect.
- Tell them why they need to know
  - To do their jobs better
  - To help customers better
- Background - Give them a little background on HUD's websites: HUD.gov, espanol.hud.gov, HUD's archives website (archives.hud.gov), and hud@work, our intranet (hudatwork.hud.gov). Explain the target audiences for each:
  - HUD.gov: for citizens and partners
  - espanol.hud.gov: for Spanish-speaking citizens and partners
  - archives: historical documents (speeches, testimony, management plans, reports, obsolete program information) for researchers, historians, students, administrations who want to see what has been done before them

- hud@work: HUD employees only
- Provide some basic statistics
- Provide a brief overview of current plans

### **HUD's Internet Website: [www.hud.gov](http://www.hud.gov)**

- Give them a brief tour of the website
- Show them how to navigate by topics, by audiences, by state
  - Explain that our audiences can get to the same information by topic or audience - it just depends on how they think about the information
  - Show them a state page and explain that the state pages are consistent across the country, so that all citizens and partners get the same high-quality information no matter where they live
  - State pages provide the bridge from generic national information to local information on our partners websites
  - State pages provide "inherently local" information to supplement the generic or national information on Headquarters pages
- Show them the **site index and search page** - <http://www.hud.gov/assist/siteindex.cfm>
- Point out "I Want To..." - those are the most important services we provide through the website...some of the major ways we use the web to achieve HUD's mission
  - Show them how you can search for a subsidized apartment
  - Show them how you can put in your name and find out if you are owed an FHA refund
- Show them the "quick links" - those are links to the most requested information on the website
- Show them the "rotator" section - that's where news releases and current "message" information is located
- Point out the About HUD page
  - Mission
  - Organization
  - Principal Staff
  - Links to all offices
  - Phone book
- Point out "Contact Us"
  - Show them the email policy
- Point out "Common Questions"
- Tell them about **Email lists**. Tell them about the shortcuts or "aliases" - the short URLs that they can give out to customers to get them to the most-used information on the website <http://hudatwork.hud.gov/po/odoc/webinc/aliases.cfm>
- Tell them about **webcasts** - and **podcasts**- Show them the page(s) for their office (either HQ office page or state page)
- Take questions

### **Intranet**

- Explain that employees want the intranet to have less content that is simpler. They want to be able to collaborate with others working on similar projects or with similar interests.
- Show them the basic navigation
- Show them how to use the locator to find people in an organization
- Explain other key features as they become available.



- Take questions

### **Archives.hud.gov**

- Explain that this website is actually a separate website, where older obsolete web content is moved to keep it available to the public, while at the same time we won't have to maintain it.