

Best Nonprofit Sector Intranets 2010–2020

10 Case Studies of Award-Winning Intranets from Nonprofit Organizations; Reprinted from the *Intranet Design Annuals*

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Contents

About Nonprofit Intranets	5
About This Report.....	6
The MITRE Corporation (2010).....	7
Howard Hughes Medical Institute (2010).....	39
Habitat for Humanity International (HFHI) (2011)	100
National Geographic Society (2014).....	139
American Cancer Society (2016)	169
Goodwill Industries International, Inc. (2017)	199
American Medical Association (AMA) (2018).....	236
UN World Food Programme (WFP) (2018)	273
United Nations (UN) (2020)	321
Wellcome Trust (2020).....	383
Selection Criteria and Process	425
About the Authors	428
Acknowledgements	431
A Leading Voice In The Field of User Experience Since 1998.	432

About Nonprofit Intranets

THE WINNERS

2010

[The MITRE Corporation](#)

[Howard Hughes Medical Institute](#)

2011

[Habitat for Humanity International](#)

2014

[National Geographic](#)

2016

[American Cancer Society](#)

2017

[Goodwill Industries International, Inc.](#)

2018

[American Medical Association](#)

[UN World Food Program](#)

2020

[United Nations \(UN\)](#)

[Wellcome Trust](#)

You can find the *Intranet Design Annual* for the current year at

<http://www.nngroup.com/reports/intranet-design-annual/>

Past *Intranet Design Annuals* available at

<http://www.nngroup.com/reports/past-intranet-design-annuals/>

About This Report

A large number of winners of Nielsen Norman Group's annual design competition for intranets with great usability have come from the nonprofit sectors. Charities, schools, cultural organizations, and other nonprofits are challenged to increase budgets and fundraise. They need to be meticulous with overhead spending and managing donations, and inspire a local and sometimes a global community to give to their mission and cause. These imperative needs affect every employee at nonprofit organizations and intranets are a key player in meeting such needs and goals. Nonprofit intranet designs have advanced to amazing levels, which we outline in this report.

We hope that this report will inspire companies to continue to emphasize good intranet design, and that it will challenge organizations to continue to innovate in their own knowledge domains as well as in their enterprise application designs.

This report presents the case studies of winning intranets from the nonprofit sector since the Intranet Design Annual in 2007. Of course, some of these profiles are fairly old by now, and the winning intranets have been redesigned and don't look like the screenshots in their write-ups anymore. But even the oldest winners still contain many good ideas that the vast majority of intranets today would do well to emulate. And the war stories, what it took for the winning teams to persevere and get a great design done, certainly continue to ring true today, as they will a decade from now.

The MITRE Corporation (2010)

Using the intranet:

The MITRE Corporation is a not-for-profit organization that manages four federally funded research and development centers (for the US Department of Defense, the Federal Aviation Administration, the Internal Revenue Service/Virginia, and the Department of Homeland Security).

Headquarters: Bedford, Massachusetts, and McLean, Virginia

Number of employees the intranet supports:

Over 7,000 scientists, engineers, and support specialists, 65 percent of whom have master's or PhD degrees. Staff members work on hundreds of different projects across the company, demanding a high level of technical, operational, and domain knowledge.

Company locations: The MITRE Corporation has two principal locations—one in Bedford, Massachusetts, and the other in McLean, Virginia. MITRE also has additional sites located across the US and around the world.

Locations where people use the intranet: The US, Belgium, Germany, Japan, Tokyo, Netherlands, Republic of Korea, Taiwan, UK

Annual sales: \$1.2 billion revenue (2008)

Design team:

In-house team members from three different divisions bring unique skills in user-centered design, development, and knowledge management.

Team members: Tony Carlucci, Developer; Donna Cuomo, Chief Information Architect; Bill Donaldson, Department Manager; Dave Donegan, Portal Team Lead; Stan Drozdetski, Human Factors Engineer; Krista Kennedy Groenwoldt, Information Architect; Mike Phelan, Developer; Fran Yang, Developer

SUMMARY

Who would guess that, at a highly technical company where 65 percent of employees have advanced degrees, many users don't know how to use their company-issued smartphones? This sort of insight, uncovered in user research, gave the MITRE team something to work with as they developed their intranet and its mobile version.

It taught the team that nothing can be taken for granted. Although users might ask for a mobile version of a site, and it might seem like a logical step, the reality is that many users have no idea how to type a URL or enter a password into a phone. At MITRE, conducting user research helped the team identify and tackle issues like this as they develop and work on internal applications.

While the team does address new areas such as mobile access, they don't neglect working on the intranet portal itself. The customizable homepage features some areas that can't be changed, including corporate news, banners, navigational items, search, and access to the *Phonebook*. Other areas are customizable and users can choose from over 75 services to design a page for themselves. However, the team has found that few users go through the steps of customizing the page. Most leave the default view.

Knowing that customization was helpful to some but ignored by many, the team is moving toward developing more personalized content. The key difference between customized content and personalized content is effort: Personalization pushes information to the user and is seamless. Customization requires the user's

engagement with the site. If users don't see, understand, or have any interest in the option to customize content, customization will likely fail to draw users in.

The team has already moved toward more personalization, providing some information for users based on their login information. Users currently see information about their business unit and employee travel, along with a list of *Community Share* sites of which they are members. The team is moving in the direction of providing more personalized content in the future and hope to push content based on role, organization, and geographic location.

The homepage provides a combination of news, timely information, and links to move users directly to the site areas they need. Corporate news appears in the center of the page, with one story accompanied by an image and summary and others listed with headlines only.

Action items are also listed in this area of the page, highlighting any outstanding activities the user needs to complete. These messages are automated and are pulled from many different applications. For example, items might remind users to install software updates or patches, to approve or review material, or change their password.

The *MyMII* menu shows users the main site navigation. There is no overarching global navigation available throughout the intranet. As a result, the main site navigation appears in a box on the homepage rather than in a more standard location. The header at the top of the homepage is repeated throughout the intranet, as a first step toward building a consistent navigational experience. The standard bar includes a link back to the homepage and an open search field that allows users to submit a *FastJump* search (a search structured around Best Bet results), a *Phonebook* search, or a standard site search.

The *FastJump* search—available by entering a search term and selecting the *FJ FastJump* button next to the open search field—is the team's fix for full-text search, which has a diverse set of content and results, and navigation that sometimes confuses users. The standard site search offers a breadth of content, that may or may not include the specific results that users need. Like many intranet teams, MITRE's has discovered that search solutions can't simply be implemented and left alone. They require constant monitoring and adjusting to make them as effective as possible. To that end, team members monitor any queries that return zero results via the standard site search and try to fix the problem.

The *FastJump* tool combines keyword navigation and search. Users can enter a keyword that will jump them right to the content needed, such as entering "cafe" for information about the cafeteria.

FastJump is the primary way users navigate, which makes sense as the intranet is comprised of many different Web collections with no overarching navigational structure. *FastJump* keywords and results are updated nightly from a database to give users the "Best Bet" results. To further encourage use of the *FastJump* tool, many company communications and ads reference *FastJump* keywords. This lets users see a keyword in a communication and then go to the site, enter the keyword, and move directly to the information they need.

Elsewhere on the homepage, *MyMII Info* gives users quick access to relevant information, such as pay statements, personal information in the *Phonebook* tool,

and timecards. Users can also customize a list of favorites to link to areas of interest on the site.

Users can add other pieces of content to the page, such as a list of personalized RSS feeds, infrastructure status, or department news—basically, whatever the user is interested in.

The page offers intranet Google search in the upper left-hand corner, and users can choose to search all content (*General*), to search for expertise within the company, or to search shared listserver-based messages. In addition, the search for the *Phonebook*, or employee directory, appears at the top of the page. This is in addition to the search tools available in the standard bar, which appears on every page.

Pictured: The site's homepage presents navigational links, news, personalized content, and customizable content. Most navigation on the site is done via the *FastJump* tool, which returns hardwired results for keyword queries and appears at the top of the homepage and each page of the site.

A popular intranet application is the *Phonebook*, or employee directory. The tool offers standard location and contact information and displays each person's position in the organizational structure. But the profiles go beyond this standard information to become a knowledge-sharing tool. *Phonebook* shows employees' availability for the day, which helps with planning meetings and calls.

Phonebook also offers a *Community Share* section that shows documents the employee recently posted. This information gives people a view of the employee's

work, as well as acting as an alternate way to find a document. Users who know the author of a document can use the *Phonebook* to find the author and then find the document. This allows users who don't know a document's name to find it within a small list of options, rather than running a full site search.

Communities content shows which groups the employee is associated with. Finally, *Phonebook* lists project information, showing not only what projects the employee is working on, but also the number of hours logged to the project and the percentage of time spent on each. Employees can use this project information to navigate from one employee to another. For instance, someone might look up a particular employee working on a project, see that she's unavailable, and use the *Project Charges* information to navigate to project information and find another available person on the project.

The screenshot shows the MITRE Phonebook interface. At the top, there's a navigation bar with 'Home', 'FJ FastJump', 'Phonebook', and 'Search'. Below this, the 'Phonebook Person Information' section displays a profile for Kristina K. Groenwoldt, including her photo, contact info (@mitre.org), and location (Bedford, 2M, M Building). A dropdown menu is open, showing options like 'Person', 'Project/Task', 'Organization', 'Community', 'Mail List', and 'Service'. To the right, an 'Availability' calendar shows her status for the week of June 19-25, 2009. Below the calendar, the 'Community Share' section lists recently published documents with links and dates. The 'Communities' section shows a tree view of groups she belongs to, including 'R305 - Information Management and Practice' and 'MITRE Innovation Program'. The 'Project Charges' section at the bottom shows a table of her work hours for various projects in FY09.

Hours	Percent	Project #	Project Name
1263	94.9%	-IA	IA INFO ARCH SERVICE
66	5.0%	-AT	AT TRAINING
2	0.2%	-IS	IS INFO ARCH STRATEG

Pictured: The *Phonebook* employee directory. *Phonebook* acts as a knowledge-sharing resource as well, giving users information about the documents employees have published, communities they're associated with, and projects they're working on.

Another intranet application is the *Expertise Finder*. And it does just what it says. This search tool helps employees find colleagues with particular expertise. The tool works by searching content from a number of repositories and using metadata to associate the results with a person. So, a user can enter a topic and see the employees who work in that area. The results are displayed as a list of employees, with each employee's name, photo, and title. This information is followed by a list of items that the employee has posted to the site that are related to the entered query. So, a search on, say, "zebras," will return the employee with the most zebra-related content first.

The tool shows employee information, followed by the employee's top three matching items or topic-related documents. The total number of relevant items associated with the individual is listed beneath his or her picture. Users can click through to see the full results for that person. This is a unique way of creating a tool that meets a specific organizational need. The tool takes advantage of the resources available and looks at the data in a different way, finding experts by examining documents.

The screenshot shows the MIT Expertise Finder interface. At the top, there's a navigation bar with 'MIT Home', 'FastJump', 'Phonebook', and 'Search'. Below this is a search bar with 'soa' entered and a 'Search' button. To the right of the search bar are links for 'Advanced Search', 'MITRE Expertise Resources', and 'Search Help'. Below the search bar, there are tabs for 'General', 'Expertise', and 'Lists'. The 'Expertise' tab is selected, showing 'Searched for soa.' and '314 results from 162 people in 11.2457 seconds.' Below this, there are links for 'E-mail top 10', 'E-mail top 50', 'Normal view', 'Expand all', 'Unattributed results', 'Search details', and 'Organizations'. The results are listed under three employee profiles:

- Stefan Tilkov - Information Management Sr**: 21 items total. Top results include '10 Principles of SOA' (random thoughts on SOA but most interesting is #7 Loosely coupled loosely coupled, recommended, soa) and 'SOA Characterization Framework - MITREpedia' (scf = SOA Characterization Framework framework, recommended, scf, soa).
- Information Management Lead**: 9 items total. Top results include 'The Cloud-SOA Connection' (The Cloud-SOA Connection ... In SOA, enterprises use integrated application services in a more lightweight fashion than traditional application platforms ...) and 'FW: Implementing Successful SOA Pilot Programs' (FW: Implementing Successful SOA Pilot Programs. This SOA webinar Mar 21st at 1:00 PM may be of interest to Fred Zapp and others ...).
- Info Systems Eng, Prin**: 8 items total. Top result is 'Draft of SOA Conference' (Hosted by The MITRE Corporation, & the Federal SOA Community of Practice (SOA/COP). This conference will happen soon - McLean, Virginia April 30 ? May 1, 2008 ...).

Pictured: The *Expertise Finder* helps users find colleagues with particular skills or knowledge. Users can enter a term or topic and see a list of employees who have produced topic-related content, as well as view that content to see whether the expert is a good match for their needs.

Another creative way to share information via the site is to use *onomi*, a social bookmarking tool. All site users can bookmark and tag any content, from anywhere on the Web, and add it to the site's *onomi* area. Users can go into this section and look for content associated with a particular tag or browse bookmark collections by user to see what colleagues are reading and bookmarking.

The page lists recent bookmarks as well as recent popular tags, providing a springboard for users to dive into the content. Popular tags are tracked on the side of the page so users can see what's currently of interest within the organization. This sort of social tool isn't just a curiosity, it's a way to use the organization's collective resources to provide relevant and timely information to the workforce. Users can also add a content module on their homepage to pull content from *onomi*.

This is just one area where the site is using social networking and collaborative tools to convey and share information. The intranet also includes blogs and wikis, and even has its own *MITREpedia*. The team also has a blog where users can comment on new intranet features or even provide feedback about ideas during the design stage. The team plans to continue moving toward more collaborative and social content. A plan for "social enablement" is in the works that will let users define a network of colleagues. This would, for example, let users see the newest documents posted by colleagues, rather than by the whole company.

The screenshot shows the MIT onomi social bookmarking tool interface. At the top, there's a navigation bar with links like "MIT Home", "FastJump", "Phonebook", and "Search". Below this, the "onomi" logo is displayed along with the tagline "social bookmarks on the MIT". A secondary navigation bar includes links such as "home", "my bookmarks", "my tags", "add bookmark", "pop-onomi", "all users", "all tags", "help", and "admin". The main content area is organized into several sections: "tip of the day", "recent popular tags", "recent bookmarks", "popular tags", and "corporate collections". The "recent bookmarks" section lists various articles with titles, URLs, and user interactions. The "popular tags" section lists common tags like "mea news", "mea", "social networking", etc. The "corporate collections" section lists collections like "case study", "digital libraries", "infoservices newsletters", etc. There is also a "new users" section with user avatars.

Pictured: The *onomi* social bookmarking tool. The tool lets users add links to external content. Tagging these links makes it easy for users to find information around a particular topic or area of interest.

Although the team found that many employees didn't know how to use their smartphones, they nonetheless designed a mobile website for those who wanted mobile access. The mobile site is a separate site, designed with content aimed specifically for a mobile audience. The team considered which applications would make sense to access on a mobile phone, and selected a few to make into mobile versions. These include time reporting, the employee directory, and travel information.

The MIIMobile site has clear links directly to applications. The time reporting tool lets users enter hours and projects as well as absence information. The directory supplies basic information from the *Phonebook*, focused more on contact information and less on knowledge sharing. Travel information gives users a quick way to check flights and review reservations. All three applications are a great fit for mobile access. Users might need to report their time while away from the office, find a location or person on the way to a meeting, or check a hotel reservation and car rental information as they land at an unfamiliar airport.



Pictured: The MII mobile site and applications. The team designed a separate mobile website focusing on only the most appropriate applications, including time reporting, the employee directory, and travel information.

The intranet team strives to build practical solutions to fit users' needs. Inefficiencies with search led to *FastJump*. The importance of knowledge sharing led to a robust employee directory and expertise search. A recognition of the power of communication among employees led to social tools such as *onomi* social bookmarking and *MITREpedia*. When faced with challenges, the team strives to come up with creative, user-focused solutions.

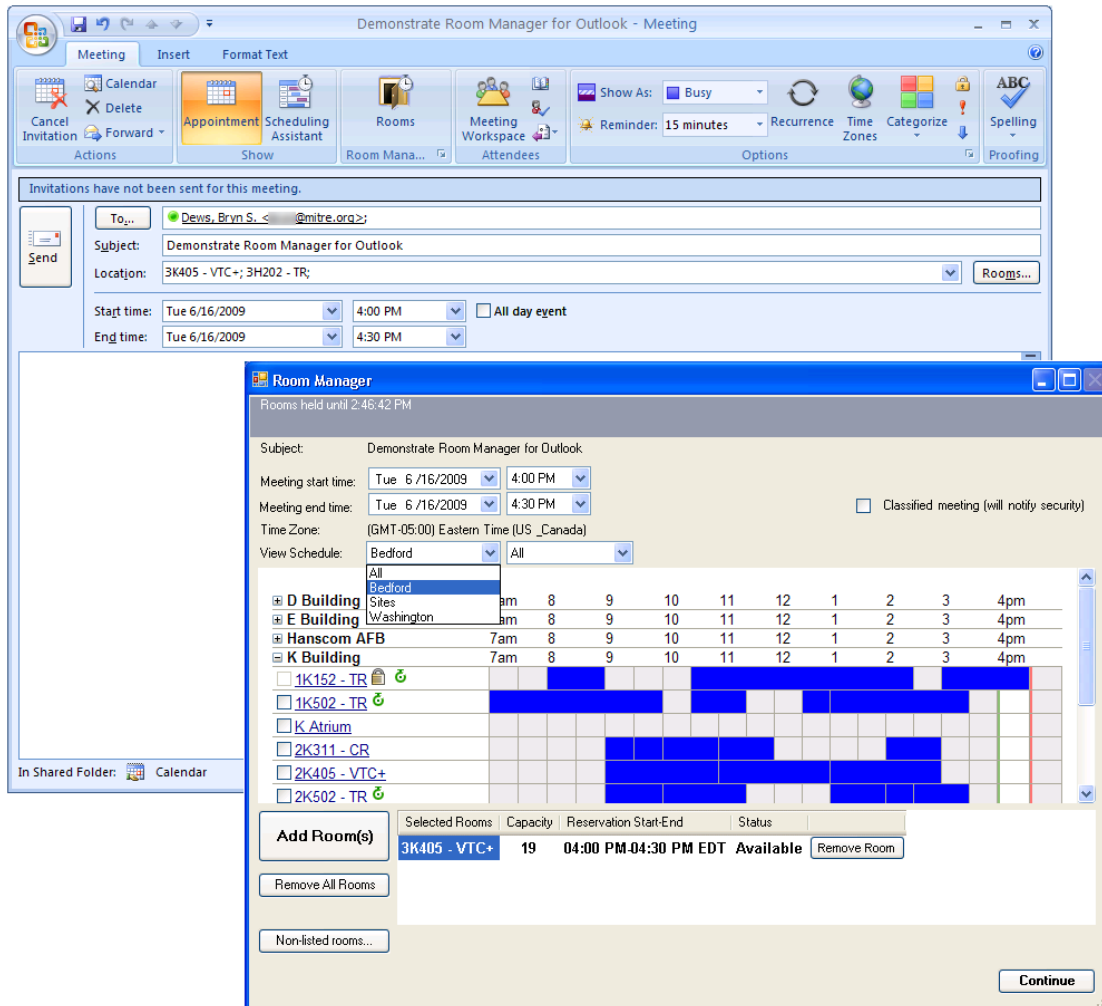
BACKGROUND

MITRE's intranet (MII), started in 1996 when then company president, Victor A. DeMarines, believed MITRE was not leveraging its expertise as well as it could. There was a feeling among the company's leadership that it needed to develop a culture of sharing.

Before MII, expertise at MITRE was a closely held commodity within each of the company's independent business units. This information was static. Not everyone knew who MITRE's in-house experts were, never mind how to tap and share their knowledge.

When the MII was born in 1996, it offered three main functions:

- **Corporate directory.** The corporate directory was not just a collection of names and numbers. It included personal profiles and resumes of all MITRE employees as well as any material they may have published in their specific areas of expertise.
- **Knowledge sharing.** Knowledge at the company was amassed through two main repositories: the Systems Engineering Process Library (SEPL) captured best practices of key software systems deployed throughout MITRE, and the Risk Assessment and Management Program (RAMP) contained 10 years' worth of lessons learned from all MITRE projects.
- **Administrative tools.** Laborious HR documents such as timesheets and service requests could be filled out on MII, as well as property inventory and tracking forms (key documents in a government-funded organization). A facility-scheduling application let users locate, schedule, and equip meeting space throughout MITRE.



Pictured: Outlook's Room Manager tool. Because the MITRE team is always looking for integration points and opportunities to streamline processes, they created an application to reserve a conference room right from the user's Outlook client (as opposed to making them to go to a separate Web-based tool). The company has developed high-powered collaborative VTC rooms with multiple projectors and Web and audio conferencing. To maximize use of these facilities, a Web-based scheduling tool (Room Reservation System) lets users set up multipoint VTCs, private rooms, and proxies that are beyond Outlook's room scheduling capabilities. Room Manager for Outlook adds the ability to book rooms within an Outlook meeting proposal, leveraging MITRE's Room Reservation System on the back-end. Rooms are selected by clicking the *Rooms* button in the menu bar; the results of the room selection are auto-filled into the meeting's *Location* field.

Evolution

As the MII has evolved over the years, the early tools have evolved, new tools have been added, and the content space has been expanded. The corporate directory now integrates with Microsoft Exchange to show a person's availability, and with

SharePoint, displays an employee's most recently published documents and community memberships. The portal homepage (*MyMII*) brings together content from countless disparate resources including corporate news, announcements of Technical Exchange events across MITRE, personal services targeted to an individual employee, such as *My Travel*, *My Traffic*, and *My RSS*, and project-related services, such as alerts when project colleagues are traveling and services produced by each business unit.

Today, MITRE employees do pretty much everything online, from participating in open enrollment, to monitoring their projects' financial reports, to creating development goals and writing performance reviews, to bookmarking internal and external resources in the internal social bookmarking system. The company is also experimenting with wikis, blogs, and other social networking tools, and continues to build mobile versions of popular site applications, such as time cards and the employee directory.

MII is available anytime from anywhere. Employees need only their SecureID token to log in to check email or fill out their timecard from an airport kiosk or a computer at their sponsor's location. It's this combination of comprehensive coverage, integrated tools, and easy access that makes the MII such a powerful resource.

The screenshot shows the MITRE Information Infrastructure (MII) portal homepage. At the top, there's a navigation bar with links for TRS, Help, Search, and Index. A user profile for Krista Groenwoldt is displayed, showing the login time as Monday, October 4, 2004 11:58 AM. Below the profile, there are links for Timecard, Edit Transfer, View Transfer, Phonebook Page, View Private (Windows pwd), Property, View About Me, and Change MII Pwd. A search bar is located below the profile. The main content area is divided into several sections. On the left, there's a 'NEWS&INFO' section with a timestamp of 10/04/2004 11:50 AM ET and a 'refresh news' link. Below this, there are 'Top MITRE Stories' including 'Washington: Customer Service Week', 'INFOSEC training raffle winners', 'Bedford: Celebrate Customer Service Week', and 'Corporate Chefs' October promotions'. There are also links for 'Facilities outlines service improvements', 'Summary Annual Reports now available', 'MITRE Institute EngineeringPro addition', 'Rate adjustments effective Oct. 4', 'Closing the Loop: Wireless setup', 'MyMII is now the corporate home page', 'Fiscal Year tip for EEV Web users', and 'GO DIRECTLY TO NEWS CENTER'. Below these, there's a 'GO DIRECTLY TO MITRE CALENDAR' link and a 'More MITRE News' section with links for 'Bedford: MCTV features new view' and 'Bedford: Book Drive results in 54 boxes'. On the right, there's a 'Center for Enterprise Modernization Panel Discussion' announcement for October 4th, 12-1 in 1N100, sponsored by NPW. Below this, there's a 'MII Google' search bar. The bottom section is divided into two columns: 'ADMINISTRATIVE' and 'TECHNICAL'. The 'ADMINISTRATIVE' column includes links for 'Corporate Information' (Calendar, Org Charts, Maps, Matters, News Center, P&P), 'Corporate Services' (Corp Comm, Facilities, HR, ISIS, Institute, Jobs, Legal, Room Scheduling, Security, Special Security, Travel), 'Desktop Computing' (Computer Life-cycle, Forms, Help Desk, Templates, Software), 'Financial Info Navigator' (Employee Reimbursements, Payroll, Property, Purchasing, Contracts, Proj20s, TRSInfo), 'Information Management' (KM, MII FAQ, CI&T Update), and 'Views' (Manager, Mobile Worker, New Employee, Secretary). The 'TECHNICAL' column includes links for 'MITRE Communities' (Email List Communities, Internal SourceForge (ISF)), 'MITRE Expertise' (Chief Engineers Communities, SEPD, Tech Centers, Tech Hotline, Homeland Security), 'Organizations' (AFC, CAASD, CIIS, CI&T, CEM, DDD C3I FFRDC, WC3), 'Documents & Projects' (Catalog Search, Project Share, Project Homepages Archive), 'Research Resources' (Digital Libraries, Infolink, TEx, IT Advisor, Knowledge Zones), and 'MITRE Technology Program' (Technology Transfer Office, Events, I&Ts).

Pictured: MITRE's intranet homepage design circa 2000. Keyword search at the top, personalized links in the middle, *Phonebook* search below links, a banner below *Phonebook* search, Google Search below the banner, and two columns of navigation: *Technical* and *Administrative*, as well as corporate news on the left. The intranet homepage was largely static. Aside from a few personalized links, the page was the same for everyone. It offered shortcut links to popular resources and news, along with the ability to use *FastJump* (keyword navigation), *Search*, or look up a person, project, or department in the *Phonebook*.

MITRE Home [FastJump] [Phonebook] [Search] IRS | Index | Help

TRS Timecard for
Groenwoldt, Kristina Kennedy

Distribution code: R305
Scheduled Hours: 40, Exempt
Logged in as: Groenwoldt, Kristina Kennedy

Your Timecard | Charge History | Reminders | Reports | Acknowledgments | Help

Don't forget to report ALL hours worked. Charge an [indirect project](#) when appropriate. [Print a blank timecard](#)

Week Ending June 14, 2009 [Save] [Cancel]

Scheduled workdays: ☒ Mon/8 ☒ Tue/9 ☒ Wed/10 ☒ Thu/11 ☒ Fri/12 ☐ Sat/13 ☐ Sun/14

Project	Task	Lookup	Note	Mon/8	Tue/9	Wed/10	Thu/11	Fri/12	Sat/13	Sun/14	Total
IA			Info Arch	1	9	8					21
AT			Training								
BD											
+ Add more projects											

Absence Code	Mon/8	Tue/9	Wed/10	Thu/11	Fri/12	Sat/13	Sun/14	Total
B - Paid Time Off Bank	7							7
+ Add more absence codes								

	Mon/8	Tue/9	Wed/10	Thu/11	Fri/12	Sat/13	Sun/14	Total
Totals:	8	9	11	0	0	0	0	28

☒ [View daily notes for this week](#)

Data last saved by Groenwoldt, Kristina Kennedy at 11:03 PM on Jun 10, 2009.

☒ [View changes to this timecard](#) [Save] [Cancel]

Absence Balances as of June 7, 2009

Absence Category	Balance	Used YTD
B - Paid Time Off Bank	133.31 hrs	57.00 hrs

Consider donating unused PTOB hours to the [Leave Sharing](#) program.

Maximum PTOB Balance: hrs
PTOB Accrual Per Week: 4.31 hrs
Other Hours Year-To-Date: 44.00 hrs

For assistance with this application, contact the [MITRE Helpdesk](#) or call 1-800-...
Comments and suggestions? Send email to [TRS Feedback](#).
TRS-7.5.4

Pictured: The online time reporting system. To meet the government's contractual requirements, all MITRE employees must complete a daily timecard. MITRE's time reporting system has evolved from a paper form to the current Web-based system (shown here). This system is designed to be easy for new employees to "walk up and use" while still satisfying the government requirements. It was developed through many design iterations, user interviews, observations, paper prototypes, and online usability tests, all aimed at simplifying the process, making the navigation flow more efficient, and improving the administrative interface.

Future Plans

The major push for MII in the short-term is to increase automatic personalization on the site. For example, currently, portlets in *MyMII* use a Web service that provides information—such as an employee's department, division, business unit, or location—to automatically tailor the data they show. Simple examples of this functionality

include weather and traffic portlets, which are automatically configured with the employee's location.

The next logical step is what the MITRE team calls “social enablement”—giving users the ability to designate certain people as colleagues, which adds a social aspect to their MII navigation and creates a filtering mechanism for the enormous amount of information available on the intranet. A user’s colleagues list could, for example, allow a portlet to display documents that have been recently edited by his or her colleagues, rather than everyone on the MII.

As enhanced social functionality is added, the team is expanding knowledge sharing beyond the confines of internal use. The company’s first social pilot (known as *Handshake*), already encompasses MITRE's sponsors and partners. “The goal is to support cross-organizational collaboration in a secure manner,” says Donna Cuomo, Chief Information Architect.

INTRANET TEAM

The MITRE intranet team involves small teams of project managers and developers, with some staff overlap between the teams. They support the major intranet applications (*MyMII*, *Phonebook*, *FastJump*, *Time Reporting System*, and so on). These applications undergo quarterly updates and a centralized User-Centered Design team lends user experience design and usability expertise to every major update. Information architects also support the development process with an eye toward integration opportunities between systems and services.

The intranet team has expanded and contracted as needed based on the phase of its lifecycle. During a redesign effort, there are additional UCD staff and developers. Corporate IT comprises a majority of the team, with augmentation from the business units. “Our ability to tap into the deep technical expertise of the corporation provides flexibility,” says Bill Donaldson, Department Head.



Pictured: MITRE’s *MyMII* team (left to right): Donna Cuomo, Fran Yang, Tony Carlucci, Bill Donaldson, Bryn Dews, Mike Phelan, Stan Drozdetski, Krista Kennedy Groenwoldt, and Dave Donegan.

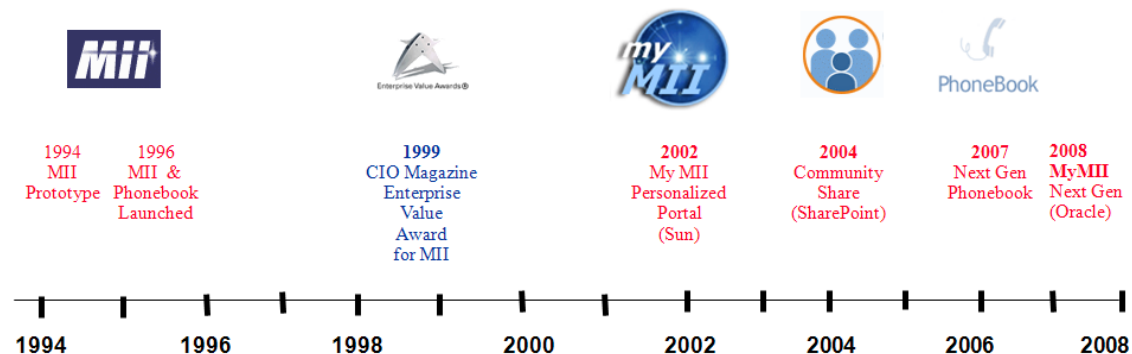
INTRANET OWNERSHIP

While corporate IT is responsible for building and maintaining many of the popular services on the site, including *MyMII*, *Community Share* (SharePoint), *Phonebook*, and *FastJump*, MITRE's intranet is a collaborative effort with a distributed development model and contributors from every business unit. The following chart outlines the roles and responsibilities of those involved in the site:

INTRANET TEAM RESPONSIBILITIES	
Role	Responsibilities
Development Team	<ul style="list-style-type: none">• Provide governance, program management of the content on the portal and the underlying infrastructure with the business units• Manage content and features
CIO Customer Council	<ul style="list-style-type: none">• Provide business unit requirements• Prioritizes requirements
Remote Sites Council	<ul style="list-style-type: none">• Provide and prioritize requirements for workers outside the main campuses in Bedford and Washington, DC

TIMELINE

MITRE's Intranet History

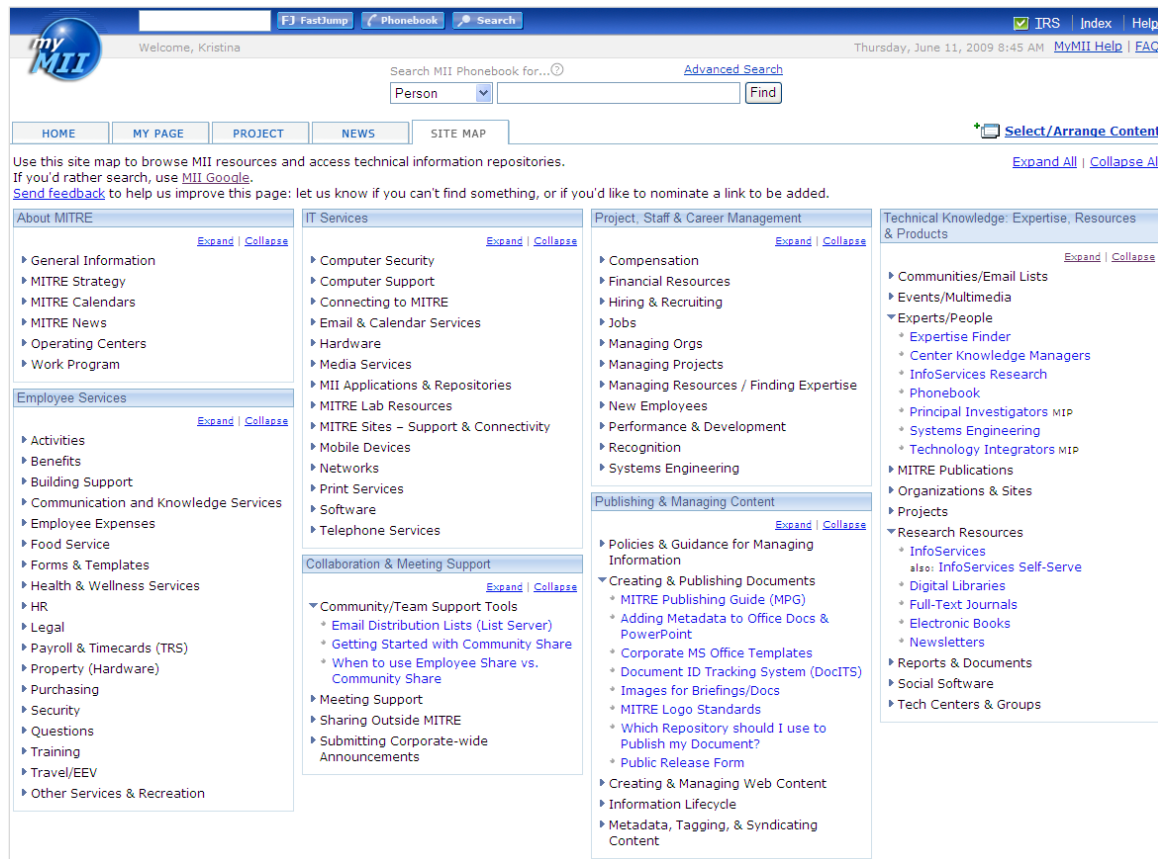


Pictured: A timeline illustrating pivotal points in MITRE's intranet history.

GOALS AND CONSTRAINTS

The goal of *MyMII* is to provide users with personalized information as the default and allow them the freedom to customize additional portlets and layouts to their own liking. The personalized information provided by the company includes links to key information, such as an employee's business unit news, travel, and *Community Share* (SharePoint) sites. Users can then customize their page, choosing from more than 75 services including items such as weather, traffic, RSS feeds, and a project dashboard. By default, all users see corporate news, banners, and navigational items such as *FastJump* (keyword navigation), search, *Phonebook* and a browsable menu based on the site map categories.

In the site's next release, users will be offered more personalized services based on their individual attributes such as role, organization, and geographic location.



Pictured: The extensive *Site Map*. As more and more resources were added to the intranet (over the course of 10-plus years), it became impossible to adequately highlight everything on the homepage. Because so many resources were completely hidden to users, the team tried to remedy the situation with this *Site Map*. It uses expand-and-collapse functionality to centralize all the links on one page. Each main category on the *Site Map* is built as an individual service so that users can add one or more of them to another *MyMII* tab if, for example, they want a shortcut link to *Employee Services* on their homepage.

MITRE Innovation Program

Home | Events | MIP Funded Projects | Proposal Process | Managing a Project | About the MIP

Search FY09 Projects and People

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By Investment Area

- Agency of the Future
- Autonomous Systems
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- Comprehensive Screening
- Emergency Preparedness and Response
- Emerging Technologies
- Enabling Technologies
- Enhancing Intelligence Analysis
- Healthcare
- Integrated Sensing, Processing, and Exploitation
- Mission Assurance
- NextGen
- Other
- Social Networking for the Enterprise
- Systems Engineering

By Fiscal Year

- 2009
- 2008
- 2007
- 2006

What is the MITRE Innovation Program?

The MIP is MITRE's internal research and development program. MIP research focuses on our sponsors' important problems and identifies areas where advanced and emerging technologies can dramatically improve mission performance or enable fundamentally new concepts of operations. Chief Engineers, Principal Investigators (PIs), Technology Integrators (TIs) and others work together as an innovation-driven organization to create measurable value for sponsors and the MITRE organization as a whole. To learn more about the program goals, visit the MIP Strategy Wiki >>

The MIP Competition is currently in the **Proposal Review Stage**, which is open from **11 May** through **1 June**.

View the entire **Proposal Review schedule** or you can add **A010cal, MIP Calendar** to your shared calendar in Outlook. Attendance at Proposal Reviews are by invitation only.

Upcoming Events

Start Date	End Date	Event
6/19/2009	8:00 AM	6/19/2009 5:00 PM
Announce MIP Funding Awards		

News

Title	Date Created
FY10 Innovation Program Proposal Review Process	4/28/2009
April Innovation Speaker Announcement	4/13/2009
MIP Idea Market open	4/8/2009
FY10 Innovation Program Competition Update	3/10/2009
Innovation Challenge Kickoff Charge Number	2/17/2009

MIP Proposal and Execution Process

Timeline from Oct to Oct:

- Portfolio Management (Oct to Oct)
- Project Execution (Oct to Oct)
- Proposal Process (Feb to Apr)
- Best Paper Competition (Mar to Apr)
- Innovation Exchange (May to Jun)

Pictured: The *MITRE Innovation Program* (MIP) SharePoint community page. The MIP website is a customized SharePoint site that lets the company easily steward information such as *News* and *Events* in a SharePoint list and push that information automatically to the MIP homepage.

Constraints

Given that most intranet teams have limited budget and perhaps a limited timeline as well, it's not uncommon to have a surplus of great ideas and not enough time or money to bring them all to fruition. "We always have more exciting ideas than time and resources available to implement them," says Donaldson. "We have also faced numerous challenges with the portal technologies over the years. While portals have many rich features and capabilities, we are using only a subset of them."

“Going forward, our challenge is to select the platform that will allow for social computing and greater collaboration with government sponsors (our customers) while balancing the complexity of today’s portals.”

USERS

MITRE employees cover a wide range of disciplines, from traditional engineering disciplines such as electrical and computer engineering, to avant-garde fields such as biosecurity and nanotechnology. One common thread is the high level of education and technical skill among staff.

USER TASKS

Since MITRE is a not-for-profit corporation, it creates self-service applications where ever possible for administration, HR, and IT support tasks. For instance, MITRE employees can use an online reservation system to reserve video teleconference rooms for multipoint meetings with audio and Web collaboration.

The MITRE intranet also supports the deep collaboration MITRE employees need to do their jobs and work in teams, including:

- Identify experts in a particular field
- Contact people and set up meetings, either in person or via a multitude of remote collaboration options
- Create and share documents internally and with sponsors
- Submit deliverables for publication
- Retain valuable information for future use as part of MITRE’s Knowledge Management practice

Most other tasks (accessing self-service applications, viewing HR information, and so on) are primarily accomplished using the *FastJump* application to locate the appropriate resource on the intranet. *FastJump* combines keyword navigation and search. Site administrators set up keyword pointers to their sites, such as “cafe” for the cafeteria information page, and *FastJump* keywords are used in company communications and advertisements. Users are so accustomed to the *FastJump* system that they typically identify it as their primary navigation mechanism, even though the site offers other navigation aides that support browsing.

The site’s *Phonebook* is also a very popular tool, used for finding people with a particular expertise and learning about their organizational affiliation, work or professional interests, availability, and published documents. MITRE employees also rely on the site’s “expertise finder” to locate experts in specific subject areas.

DESIGN PROCESS AND USABILITY ACTIVITIES

The last major redesign of *MyMII* (the intranet’s portal centerpiece) was planned through a series of design meetings with stakeholders from each business unit. The findings were augmented through a usability test that benchmarked user performance on the portal’s then-current version. To procure data that would inform its planning and design choices, the MITRE team drew from a variety of outlets, including:

- A comprehensive biannual user study

- Help desk data
- User representatives from business units and site locations
- Business unit IT equipment managers
- Internal IT training group
- Direct feedback from users

Stability and support issues meant that, during the redesign, the existing portal needed to be replaced before new designs were implemented. This complicated the rollout, as users were first faced with a portal page that looked the same but had a new customization workflow, and then—a few months later—with a new design altogether. But the team took great pains to ease users through the transition.

“A carefully crafted communications campaign helped make the transition less painful for the users,” says Dave Donegan, Portal Team Lead. User feedback indicated that employees wanted a faster and more customizable portal, so the first wave of communications highlighted these benefits of the new platform.

An animated tutorial educated users on the benefits (and the mechanics of) portal customization. And before the design’s final version was released, a group of users participated in a usability test that identified specific barriers to acceptance of customization features. For example, “the out-of-the-box Oracle Portal user interface that used to add or move portlets was confusing to the point of being nearly impossible for most users,” says Donegan. “Some [problems] were inherent to the platform and had to be handled with additional communications, while others had a technical solution.”

Finding Inspiration

The MITRE team turned to a variety of sources of design inspiration, both inside and outside the company, and tapped into the wisdom of their own user population. “We get interesting insights from user studies,” says Bryn Dews, Lead Human Factors Engineer. “But very often users come to us directly with questions, ideas, and yes, complaints.” The intranet team is even experimenting with more efficient ways to engage the user community, such as through a blog moderated by team members, where users comment on new features or provide input on ideas during the design stage.

Members of the User-Centered Design Group often take advantage of the opportunity to collaborate or at least “compare notes” with employees from other organizations. “Boston is fortunate to have a very active UCD community, with several organizations hosting regular meetings and conferences,” says Stan Drozdetski, Human Factors Engineer. “MITRE’s not-for-profit status also helps, as other organizations do not have to fear competition from our company when exchanging ideas.”

Usability Methods

Because of MITRE’s strong commitment to the benefits of UCD, it strives to obtain a deep understanding of user needs, desires, and satisfaction levels, regardless of the project. The UCD Group (part of Corporate IT) runs a biannual user study that utilizes contextual inquiry, online surveys, and video diary reports. While the study

isn't limited to the intranet, Dews says it does help highlight trends that the intranet team needs to focus on.

"The technique we use depends on the application, the product development team, time allotted for UCD contributions, size of the change, and targeted user population size," says Dews. "Normally, we start with a broader approach to target the scope better, and then involve users as we iterate the design. Very often, we test with paper prototypes or low-fidelity HTML prototypes to reduce development costs."

When embarking on the portal redesign, the UCD team followed the same "funnel-shaped" process by casting a wide net first, and working out the features through an iterative process. At the onset, the team engaged stakeholders in various parts of the organization to collect their input for the project roadmap in a series of focus groups. This data was then processed (with involvement from the development team) to identify features that could be created within the constraints of available time and technology.

For instance, the team identified the need for a better navigational mechanism to support browsing (as opposed to searching). Before a single line of "production" code was written, the UCD team prototyped three potential solutions and presented them to representative users to identify the preferred presentation. Because the prototypes evolved from static screen captures into dynamic webpages, the team could invite remote users to perform unmoderated testing in the final round.

Testing a Feature

Before the new *Phonebook* was released, the MITRE team performed a baseline usability test to time how long it would take users to accomplish a series of 13 tasks (using the old *Phonebook* and whatever other navigation mechanisms they normally used to find communities, documents, a person's availability information, cell phone number, and so on). The average time it took to complete a task in the baseline test was 40.7 seconds, and participants were unsuccessful at accomplishing (or quit before completing) an average of 4.2 tasks each.

In a follow-up study once the new *Phonebook* was available, the team reused the same tasks, but this time, participants took an average of 31.3 seconds to complete a task, and the success rate drastically improved to an average of only 2.0 unsuccessful tasks per person. Between the first and second test, there was also an average time savings of 9.4 seconds per task.

Surprising Results

Mobile is certainly the next big thing in enterprise communication, but research from a recent MITRE user study indicated that not all employees who are issued a corporate smartphone know how to use all of its features. "For instance," says Drozdetski, "we observed that several users did not know how to enter a URL into the mobile browser, which would mean that simply advertising mobile-accessible URLs would not be effective. This also reminded us that even the most technical users become novices when faced with a brand new technology and that any kind of a learning curve in a corporately provided solution carries the risk of excluding users."

This type of research is valuable for moving beyond widely held perceptions, such as: “Users want intranet access on their mobile devices.” And the MITRE team was wise to conduct it. But the results didn’t deter them from developing a mobile version of some of the site functionality. They simply used their time wisely.

“There are some inherent obstacles that mobile applications pose,” says Drozdetski. “By monitoring the feedback streams, we found that users had trouble entering passwords on their smartphones—small screens and cramped key layouts do not make this an easy task.” Research such as this helps teams make informed decisions about where and how to spend their limited time and development budgets to best serve the users.

URL AND ACCESS

MyMII (MITRE’s intranet homepage) is the default homepage for all employees. The MII is used by all business units; the *MyMII* portal homepage is configured as the default homepage on every MITRE-issued computer. Although employees are free to change the homepage setting, most leave it set to *MyMII*.

Users outside of a MITRE office location can access the site using a SecureID card to VPN in. However, because some locations where MITRE employees work don’t allow VPN access, the company provides near zero-footprint access via Citrix technology.

Also, there are Web-based versions of commonly used applications (time card, email, instant messaging) for employees who use Web browsers where Citrix isn’t an option.

TECHNOLOGY

The MII started as a basic Web server with CGI applications and LDAP for the corporate directory. This has evolved to a robust infrastructure with single sign-on (SSO), Oracle Portal for personalization, Java Application Servers for custom developed application, a CMS, and SharePoint for documents and communities. Several open source technologies are used for wikis, blogs, social bookmarking, and social networking.

MITRE has standardized on Java-based Web applications for custom developed applications. It uses Jira for bug tracking and enhancement requests, HP Loadrunner for load testing, HP QuickTest Pro for automated functional testing, and JUnit for developer unit level testing. The development team has also started to use Scrum methodology for agile application development.

SEARCH

MITRE is a company that recognizes the power and importance of effective search, but also understands that making search effective is an ongoing effort that requires vigilance and commitment to change. It’s never really a done deal.

Search results are tracked with monthly reports, showing top keywords and queries. For instance, “zero hits” queries are randomly evaluated so that the team can figure out why no results were returned and add or modify content as needed to meet user demand.

The MITRE intranet features several types of search to help users quickly get to what they want.

In addition to site search, the intranet content team manually maintains *FastJump* resources. *FastJumps* are loaded on a nightly basis from an Oracle database to the intranet search system to provide a "Best Bets" type of search result. "Also," says Robert Joachim, Information Systems Engineer, "key repositories and content releases are reviewed on a regular basis to identify specific content for promotion."

Expertise Finder is a custom Java-based application that uses search as a Web service to identify MITRE staff with expertise that matches a user's topical query. "Using search results from various content repositories, MITRE staff members are identified through the use of metadata attributes associated with retrieved content objects," says Joachim. "Our plans are to extend this feature to a community finder application, which would use both descriptive summary metadata and full-text content to identify online communities (SharePoint sites and Listserver groups)."

The site's main intranet search engine is the Google Search Appliance (GSA), in conjunction with customized applications using the GSA as a search service. Content and data repositories are integrated into the search engine via various methods, including conventional content crawls, direct SQL database crawls, and XML feeds.

"We leverage Google *KeyMatch* to promote *FastJump* (Best Bet) resources and OneBox for content promotion of information in key repositories," says Joachim.

Though many of the company's data repositories also have their own dedicated customized search interfaces, MII Google currently indexes the following:

- Shared content folders (*EmployeeShare*)
- Microsoft SharePoint (*CommunityShare*)
- Distributed Web servers, including blogs and wikis
- List messages from the company's corporate listserver
- Corporate shared social bookmarks (*onomi*)
- Metadata catalogs, such as technical report records, from the MITRE corporate library system
- The *Technical Exchange Meeting* (TEM) site, which houses event presentations, meeting minutes, and attendee lists

Beyond Full-Text Search

In addition to enterprise full text search, the team is also exploring the use of faceted navigation and information discovery techniques to provide additional retrieval capabilities for the site's users. "Using the Endeca information discovery platform, we are building common, persistent data models of more abstract information objects such as 'projects,' 'people,' and 'communities,'" says Cuomo. The technology lets the team combine structured data with mined concepts extracted from unstructured sources, which allows projects, people, and communities to be retrieved and analyzed, and relationships between them to be viewed in ways not possible with full text search alone.

Search as Evolution Rather Than Destination

Having a good search tool doesn't mean the work is done, and the MITRE team recognizes that fact. "We regard search as an evolution of technology platforms,"

says Joachim. "In our earlier intranet era, before 2002, we were not satisfied with search vendor products and the seeming lack of integration with Web-based models and went looking for a solution oriented to intranets, especially for Web-based relevancy ranking."

After early adoption of the GSA (version 3), the company has continued to enhance features via Google releases (currently, version 6). "That said, we continue to watch and evaluate the search marketplace and do/will make adjustments as new platforms and technologies emerge and evolve," says Joachim.

MOBILE

MII Mobile is a separate homepage with links to the few select apps that have mobile versions. The applications chosen for mobile adoption were those that are important to the widest number of users and include time reporting, *Phonebook*, and *My Travel*. The mobile page also has a link to a short FAQ section and a downloads page that lists native BlackBerry applications that are supported but aren't available over the air.

The mobile applications that MITRE has developed are all tailored versions of the standard Web applications (as opposed to native BlackBerry apps). This approach will allow the applications to run on any smartphone (iPhones and Android, for example) without the team having to rewrite them as a native application. "While a native smartphone application could have a richer experience, we have not seen the need for this additional functionality for our users," says Dews.

The mobile versions of applications use the same core that the Web applications use, but have a separate user interface styled to reduce the need to scroll and provide only the necessary functions on a smaller screen. "We confirmed design decisions by showing mockups to potential users, and later inviting them to try out the application," says Dews. "In addition to the user interviews, we got ideas on presentation and what to include from other travel applications (TripIt, WorldMate, etc.) Mobile applications have been a huge hit with the users."

Pleasing the Users

The mobile applications have generated generous praise from the users. "The mobile applications have moved the users in ways not typically seen in corporation," says Dews.

"Imagine my surprise reading a user feedback message to the mobile *Phonebook* developer, 'OMG. This is fantastic. Will you marry me? <g>' after releasing a mobile version of the *Phonebook*," says Donaldson. "Corporate IT doesn't yield this type positive reaction."

User Testing for the Mobile Environment

The mobile pages were designed with BlackBerry devices in mind, since those are the only corporate devices with access to MII Mobile. Employees use a range of models and firmware versions, so the development team tested on emulators for the most common ones (8330 and 8830) plus a few other models to cover the older and newer operating systems, as well as the varied screen sizes. "Our biggest challenge was the varied support for CSS properties across the versions," says Donegan.

Early user testing on the mobile applications provided the team with great feedback regarding both use and user interest. "We did some early interviews showing paper mockups to current BlackBerry users when designing mobile versions of the *Phonebook* and *My Travel*," says Donaldson. "This was done to gauge interest and determine what content was most important to mobile users. In the *Phonebook*, for instance, we found that room numbers were vital, so we moved those above the fold."

When the mobile applications were piloted (that is, available in production, but not widely announced), the team performed some basic usability testing. Dews explains how this worked: "We met employees in their office and had them try a few tasks using their own BlackBerry. We did not have a good way to record the screen, so we just looked over their shoulder, occasionally asking them to show us the screen if we noticed a presentation issue. We wanted participants to use their own devices to see how the pages looked on the various models with their font settings."

During these sessions, the developers did find a few issues with functionality; for example, users wanted to be able to update project charges for the day if they worked extra hours or made a mistake. But there were also some issues with limits that had been set to keep the page size small. For example, showing the five most recent project numbers was not sufficient for employees who needed to charge many different projects.

"There were also some problems with how we tried to make the content fit on the small screen," says Dews. "Take 'availability' on the *Phonebook*, for instance. In the full *Phonebook*, one's availability is shown as a horizontal table with different colored squares for each half hour. In the mobile version, we tried showing a single square for the current half hour, but users did not always recognize it."

Frequently, as mentioned before, the team observed the difficulties people had with basic use and device functionality. "Many were not regular users of the mobile browser, so they weren't sure how to enter a URL or how to exit the browser without repeatedly hitting the back button," says Dews. "In most BlackBerry apps, the *Back* button does return you to the home screen; in the browser, it works like a *Back* button." The design for the mobile applications took these factors into account so users would have a better experience when accessing them on a BlackBerry.

CONTENT AND CONTENT MANAGEMENT

The MII follows a distributed (down to the individual employee) publishing model, and the number of content publishers dwarfs the number of dedicated designers, developers, and usability professionals. "Enforcing strict publishing standards would be next to impossible," says information architect, Krista Kennedy Groenwoldt. Instead, the intranet team focused on core requirements, such as standardizing on one navigational header.

"We also worked hard to feature the more usable/corporately supported design as the path of least resistance, with ready-to-go site templates reducing the need for custom development," she says. Along with the templates, the intranet team records and publishes design and usability guidelines that help content publishers produce more consistent, accessible, and usable work.

The site utilized a traditional CMS system (currently transitioning from Rhythmyx to Oracle) for corporate information that must be distributed in several different

formats, such as corporate news that is published in HTML variants and RSS. Individual content publishers either use SharePoint or publish HTML documents.

FEATURES

The following features comprise some of the intranet's more robust and useful functionality.

My Actions

My Actions is an extensible portlet that resides on the *MyMII* portal. Using input from various applications, the portlet notifies users of time-sensitive actions that they need to take. Users get a visual alert when events are coming due or are overdue. Examples of actions that are pushed to users include:

- Security patches required for the user's computer
- Purchase orders that need approval
- Public release documents that need review
- Resource management assignments that need approval
- Passwords that are about to expire

Phonebook

MITRE's enterprise employee directory, known as the *Phonebook*, is the most popular tool on the intranet. "In usability testing, people told us they use the *Phonebook* anywhere from a few times per day to hundreds of times per week," says Groenwoldt.

From its inception more than 10 years ago, the *Phonebook* was always more than a typical corporate directory. On the *Person* pages, for example, in addition to the typical employee photo and contact information, the *Phonebook* provides detailed organizational information from the company's PeopleSoft system, fiscal and HR signature authority, the date the employee was hired, a detailed section on the employee's project charge information (obtained from the fiscal system), as well as links to that employee's resume and publishing repository.

"If a user wanted to find a document that someone else had published, he would look that person up in the *Phonebook* to easily access that person's publishing space," says Groenwoldt. "Similarly, if a user looked up an employee to ask a question about a project and that employee was unavailable, he could click through to the project page to see who the project Leader is, and who else supports that project as alternate sources of contact for that project."

Some of the *Phonebook* functions include:

- **Encouraging collaboration.** Through integration of Microsoft Exchange, the *Phonebook* shows employees' availability. Also, the *Phonebook* shows an employee's current projects (from the time reporting system), published documents, and community memberships, including SharePoint *Team Sites*.

- **Simple look up.** Users can start their search with any piece of information and easily browse the greater information for all related object types. If users know, for example, that Jane Doe is a member of a community team site that they want to access, but they don't know the team's formal name, they can simply look up "Jane Doe," view her community memberships, and click the right name to access a page with its descriptive information, including the names of the community owners to contact for access information.

Remote Access

Because many of the company's employees travel for sponsors and work at sponsor locations behind firewalls, MITRE provides a webpage with the most commonly used tools for remote access (timecards, email, instant messaging, remote meeting desktop sharing, and secure FTP). For example, MITRE employees can check their email and calendar via Outlook Web Access by accessing the specific external URL and using a combination of authentication methods.

"Through repeated surveys and interviews of remote users, we have continued to refine the service offerings and the way we display them," says Dews. "The most current instantiation of the remote access portal (RAP) is the result of several rounds of testing and feedback." To access all of these remote services, MITRE employees need only an Internet connection, the RAP URL, and their SecureID.

[FastJump](#)
[Phonebook](#)
[Search](#)
[IRS](#)
[Index](#)
[Help](#)

Remote Access Portal

Search this site:

[Home](#)
[News](#)
[FAQs](#)
[Resources](#)
[Key Contacts](#)
[Feedback](#)
[Help](#)

When you are working from ...

Home,
Hotel, Kiosk
Public Access Point
or Sponsor Site

Bookmark <http://remote.mitre.org> and always have your SecurID handy!

You can access the external Remote Access Portal from any location!

Click on a button to directly access the service from almost any web browser (without VPN!):

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[Timecard](#)
[More info](#)

[Instant Messaging](#)
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[Web Conferencing](#)
[More info](#)

[Secure File Transfer](#)
[More info](#)

If you need to do more ...

VPN provides full access to MITRE network resources. MBridge provides consolidated virtual desktop access to most MITRE network resources and is a preferred connection method when VPN is not an option.

[MBridge](#)
[More info](#)

[VPN](#)
[More info](#)

If you have a MITRE-issued BlackBerry ...

Access MITRE applications from your MITRE BlackBerry at <http://mobile.mitre.org>.

[More info](#)

Current as of: 05/13/2009 | Content Provider: Remote Access Team | FastJump: [remoteaccess](#) or [rap](#)
Please send feedback, suggestions, or requests for assistance to the [MITRE Corporate Help Desk](#).

Pictured: The *Remote Access Portal*. One of the nice things about MITRE's intranet is that employees can access it from anywhere, at any time. MITRE has employees working around the world and many have limited network connectivity from their government work locations. The *Remote Access Portal* offers quick access to top applications for working outside the firewall from any computer using remote desktop access via Citrix. While at sponsor locations, for example, employees can use the portal (<http://remote.mitre.org>) to access their email and calendar, timecard, instant messaging, *Meeting Place* (telephone and Web desktop sharing), secure ftp, or almost any other MITRE network resource. This is a powerful option for employees who work outside the main MITRE campuses, making it possible for them to be productive and "reach back" to MITRE for information.

Community Share

Because the company's collective knowledge is its most important asset, this knowledge must be easily accessible and easily shared across the company. One of the mechanisms to accomplish this is MITRE's *Community Share*, which is built on

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31

Microsoft's SharePoint platform. Communities across MITRE come in many forms, including organizations (such as departments or divisions), project teams, and groups of experts working in the same field but in different organizations across the company. *Community Share* offers these communities a place to store documents; it includes access and check-in/check-out controls, group calendars, linked lists, announcement/bulletin boards, and many other Web features. "To supplement the less than perfect browsing and searching in the native SharePoint environment, MITRE has created Web services which pull metadata from SharePoint's databases and serve that metadata in our corporate *Phonebook* directory," says Groenwoldt. "From the *Phonebook*, employees can access communities, files in those communities, or the directories where those files live, all with one click."

The metadata is linked to:

- Employees who publish the data
- Employees who belong to the communities
- Organizations who own the communities

Combined, they provide a rich and straightforward faceted search.

Role-Based Tools

MITRE's intranet offers a wide range of tools to support a variety of roles, including

- a new employee view that has everything new employees need to get started,
- a mobile view with the most popular resources for people on the road or working remotely, and
- project services to help project managers track their budgets and deliverables.

Recently, the *MyMII* team has also been making progress in presenting people with "smart defaults" based on attributes such as their business units or geographic location. If, for example, a user's primary location is McLean, Virginia, *MyMII* will now suggest neighboring Washington, DC weather and traffic as portlets he or she might want to add to the page.

KNOWLEDGE MANAGEMENT

MITRE's Knowledge Management program started about 10 years ago. "Its mission," says Jean Tatalias, Director of Knowledge Services, "is to foster knowledge-sharing culture, to support collaboration, and to champion the methods and practices to connect people and manage knowledge assets for sharing and reuse."

"It is *not*," she says, "one system, one initiative." Instead, she describes it as an accumulation of assets with many parts of the organization contributing in a process of continuous improvement. MITRE's intranet offers many tools and techniques for supporting knowledge sharing, including Google search capabilities, *Expertise Finder*, *Community Share* (SharePoint) team document sites, wikis, blogs, and the *onomi* social bookmarking tool, to name a few.

The intranet structure links employees, projects, communities, and documents, which provide both the context and the major method of knowledge sharing. Employees are also given guidance in the form of "Seven Essential Steps to MITRE Information Management" which reinforce both basic information sharing and

protection policies as well as how to apply the knowledge management toolset for effective knowledge capture. The seven steps include tips such as "Keep project files in *Community Share* (SharePoint)" and "Share as broadly as possible *and* protect information according to policy, contractual requirements, and licensing agreements."

ENTERPRISE 2.0

In addition to more traditional team collaboration tools, MITRE intranet's has a wide range of social media tools. There are several wikis, including *MITREpedia* (running on *MediaWiki*) and a custom blogging tool that supports both personal and project blogging. Efforts are also underway to explore the potential use of WordPress as a sponsor-relationship management tool. In addition, the intranet features the *onomi* social bookmarking application, which is very similar in functionality to del.icio.us. The team is also developing a social networking prototype that will allow social networking opportunities between employees as well as between employees and the company's partners and sponsors.

The screenshot shows the MITREpedia wiki interface. On the left is a navigation sidebar with sections: navigation (Main Page, Competencies, Create Article, Recent changes, Random page, Help, Feedback, MIT Home), search (input field, Go, Search), toolbox (What links here, Related changes, Upload file, Special pages, Printable version, Permanent link, Email Article, Print as PDF, Browse properties), and last 10 pages viewed (Viki, Laika, Main Page, ANALYSIS TOOL SHED, E542, Alabaster, Analysis Tool Shed, ProjectPages, MITREpedia#Statistics, Special, Specialpages). The main content area has tabs for article, discussion, view source, and history. Below the tabs is the 'Main Page' title and a list of links: MITREpedia FAQ, Browse Categories, A-Z, Mark-up Cheat Sheet, Unabridged Help, Getting Started, Ask a Question. A welcome message follows: 'Welcome to MITREpedia, the corporate wiki with information on our people, projects, organizations, customers, technology and more. Enter non sensitive data with confidence - MITREpedia backs up, indexes, and adds revision control to all content automatically.' The 'Featured Article' section highlights 'SurveyGem', a web-based survey tool funded by the ESC, with a 'Survey Gem' logo. To the right is a 'Getting Started' sidebar with links: Wiki CheatSheet, Reference Card, Reading or Editing options, How to Create Article, MITRE Wiki Users Group (new!), and MITREpedia What's New WYSIWYG (new!). The 'Newest Articles' section lists recent updates with titles, authors, and timestamps.

Pictured: *MITREpedia*, one of the company's wiki sites.

Welcome Mary Lou Tierney | Sign Out | Tech Support | User Search

Idea Market

MIP Competition HOMEPAGE | **Investment Areas** | About the Competition | My Profile | Dashboard

Investment Areas Home
All Investment Areas

Quick links:

- Financial Systems Oversight
- MISSION ASSURANCE-Grand Challenge Area
- Autonomous Systems
- Emergency Preparedness and Response
- Enhancing Intelligence Analysis
- Social Networking for the Enterprise
- MIP Idea Market Feedback

- CCOD-Grand Challenge Area
- NEXTGEN-Grand Challenge Area
- Biosecurity
- Emerging Technologies
- Healthcare
- Systems Engineering

- ISPE-Grand Challenge Area
- Agency of the Future
- Comprehensive Screening
- Enabling Technologies
- Measuring and Guiding Influence
- OTHER

	Last Activity	Idea	Posts	Views
Financial Systems Oversight Investment Area Leader: [redacted]	Idea at 06/18/2009 10:52 AM EDT	14	14	59
iSPE-Grand Challenge Area Investment Area Leader: [redacted]	Idea at 06/25/2009 11:52 AM EDT	67	114	2338
CCOD-Grand Challenge Area Investment Area Leader: [redacted]	Idea at 05/15/2009 02:23 PM EDT	125	303	4023
MISSION ASSURANCE-Grand Challenge Area Investment Area Leader: [redacted]	Idea at 05/07/2009 05:41 PM EDT	88	178	3615
NEXTGEN-Grand Challenge Area Investment Area Leader: [redacted]	Idea at 06/19/2009 11:25 AM EDT	68	253	1706
Agency of the Future Investment Area Leader: [redacted]	Idea at 05/05/2009 04:53 PM EDT	79	275	1212
Autonomous Systems Investment Area Leader: [redacted]	None	14	40	1302
Biosecurity Investment Area Leader: [redacted]	Idea at 05/05/2009 03:30 PM EDT	52	362	3656
Comprehensive Screening Investment Area Leader: [redacted]	Idea at 05/05/2009 04:50 PM EDT	18	40	665
Emergency Preparedness and Response Investment Area Leader: [redacted]	Idea at 05/05/2009 04:59 PM EDT	54	196	2747
Emerging Technologies Investment Area Leader: Ravi Athale	Review Review by at 04/24/2009 07:58 AM EDT	22	85	769
Enabling Technologies Investment Area Leader: [redacted]	Review Review by at 06/25/2009 03:10 PM EDT	48	139	1494
Enhancing Intelligence Analysis Investment Area Leader: [redacted]	Review Review by at 06/25/2009 01:16 PM EDT	43	138	2813
Healthcare Investment Area Leader: [redacted]	Idea at 05/05/2009 05:00 PM EDT	43	108	1249
Measuring and Guiding Influence Investment Area Leader: [redacted]	Comment at 05/05/2009 05:07 PM EDT	11	35	589
Social Networking for the Enterprise Investment Area Leader: [redacted]	Idea at 06/19/2009 10:57 AM EDT	35	83	1375
Systems Engineering Investment Area Leader: [redacted]	Thread at 05/26/2009 12:14 PM EDT	69	206	1824
OTHER Leaders: [redacted]	Review Review by at 04/09/2009 11:13 AM EDT	13	31	397
MIP Idea Market Feedback Contact: [redacted]	None	3	12	335

Recent Ideas
 [redacted]
 [redacted]
 [redacted]
 [redacted]
 [redacted]

Recent Threads
 Questions and answers on the Profile to Practice proposal
 How this relates to NextGen
 Why separate nets?
 Previous work
 Redundant and adds little value

Who's Viewing
0 members, 0 guests
No logged-in member is viewing this page.

Control Panel
Post New Investment Area

Support | Terms of Service | Contact Us
© 2008 - 2009 Spigit, Inc.
 edit

Pictured: The *MITRE Innovation Program* project proposal process was facilitated this year by a cloud-based tool called Spigit (shown here). The Spigit social networking tool connects company employees and aids in intranet-based idea generation and innovation. Using the *Idea Market* social networking tool, MITRE employees submitted and commented on ideas for the company's research competition, and for the concepts to be refined through collaboration. This tool helped make the research program more transparent, streamlined the process, and expanded opportunities for input into the research competition. More ideas (840) were submitted this year than ever before, with 750 comments received and more than 5,500 votes cast.

LESSONS LEARNED

The MITRE team offers a few lessons learned:

- **Personalized content is more effective than giving users customizable controls.** After eight years with a customizable corporate portal, the company still sees very little customization by the end user, with only about half of the employees making changes to their *MyMII* settings. This is why smart/well-researched defaults (such as personalized applications or portlets) are so important. End users cannot be counted on to customize their homepages, rather the organization needs to do the best it can to personalize the tools for them.
- **Templates provide both a good starting point and direction to users.** If your usability team is small, you can maximize your impact in the corporation by documenting your guidelines in a public place and try to teach publishers/developers to start from a common template. Teaching people about usability is important, but it's also very cost effective to provide them with a starting point, such as having some of the guidelines already coded in a template.
- **Guidance can come from outside the organization.** Look outside your company. It's important to baseline your intranet against other companies as part of your intranet health check. Use these external health checks to celebrate your successes and adjust future activities. The MITRE team found solace in communicating with other companies to find that it was not alone in trying to solve the issues that they faced.

BEST PRACTICES

Some words of wisdom from the MITRE team's experiences:

- **Listen to users.** Do not pass up any chance to hear from your users. Even the most informal interactions have the potential to improve your design.
- **Pilot new releases.** Releasing new features to a small group of users first helps the eventual rollout proceed more smoothly, if you are careful about collecting and acting upon feedback.
- **Learn from negative feedback.** Positive feedback is always nice to hear, but negative feedback gives you a chance to improve your product and maybe even win over a user along the way.

RESULTS

As example measures of the site's success, the MITRE team notes that:

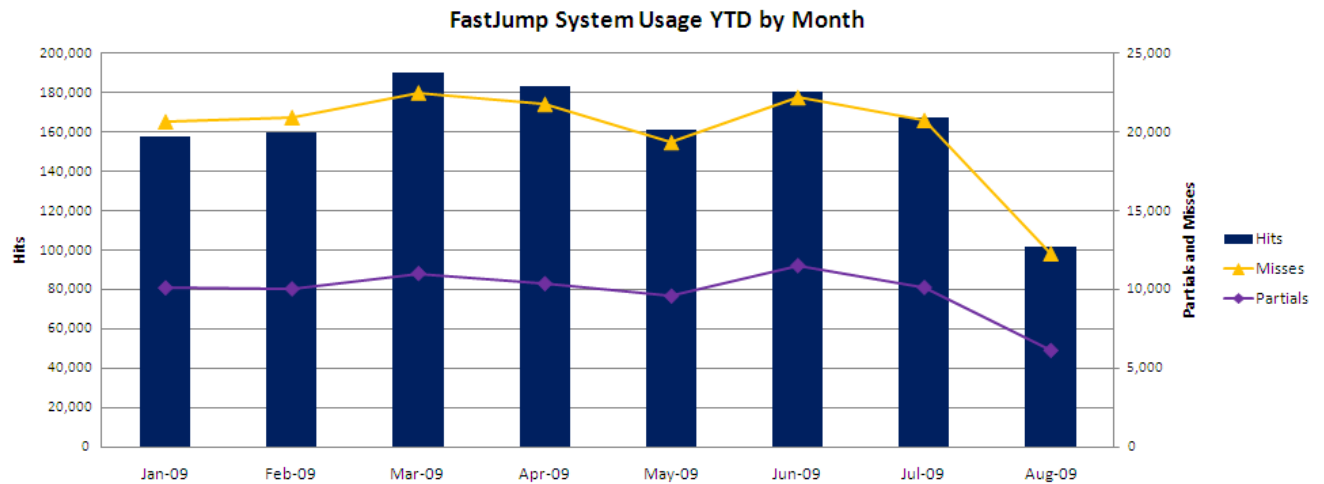
- The MII has been maintained as a showcase of intranet technology from its inception
- Lessons learned during its implementation are often used in assisting MITRE's government sponsors

Also, the team conducts many measurements on the site. The main measurement tool is WebTrends, which provides high-level usage statistics of hits and views.

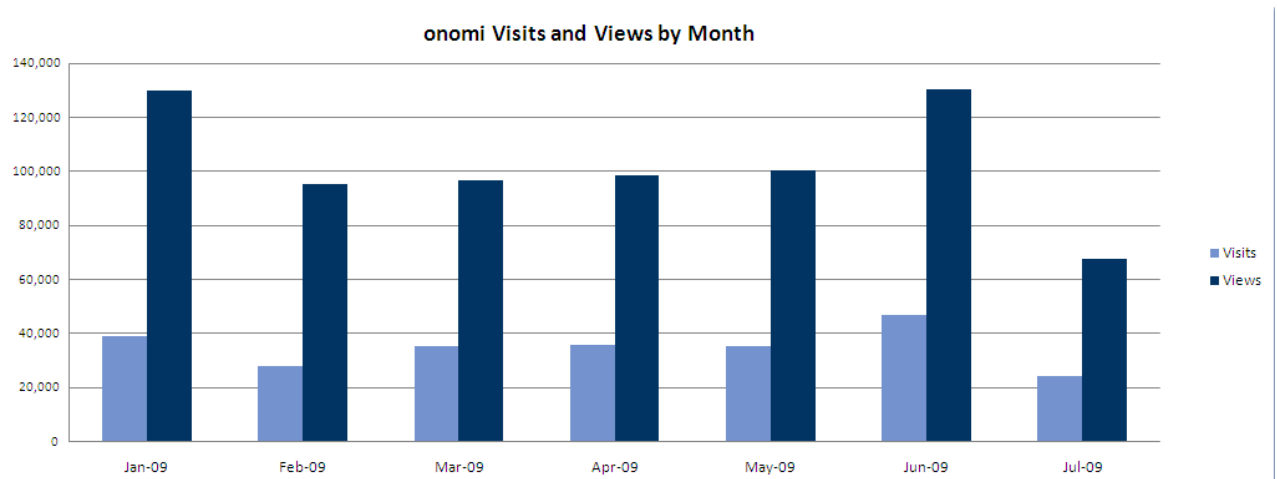
The team typically focuses on measurements when new features or applications are deployed so they can better manage the adoption. "We also use these measures for general trending of mature applications," says Donaldson. "One example was the *Mobile Travel* application. We noticed that after a period of adoption, usage started to drop."

Because team members were alerted to this trend, they could poll the users to find out the cause of the drop and address it with a campaign to drive usage back up.

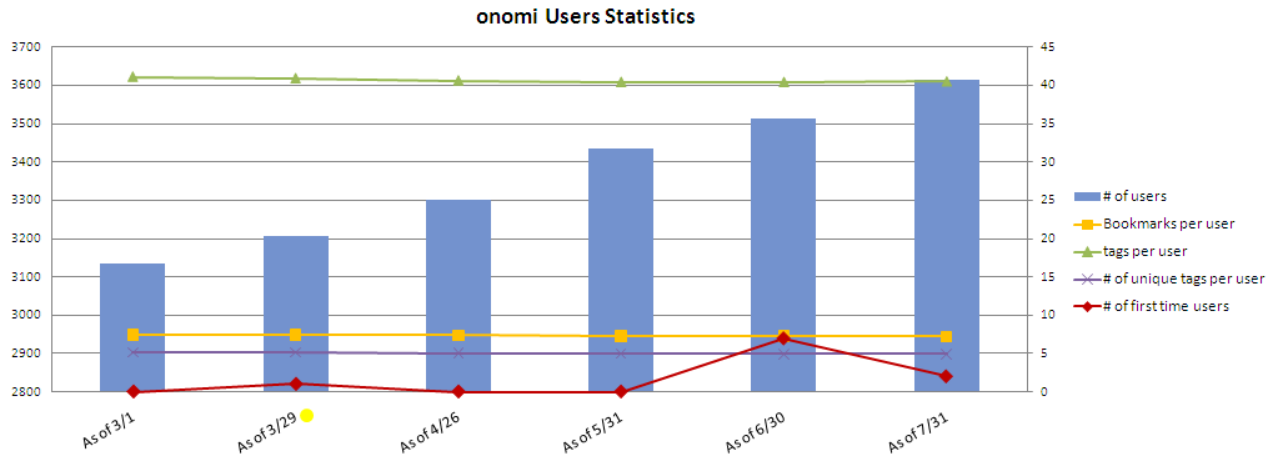
The following chart shows some measurement results for the 2009 calendar year:



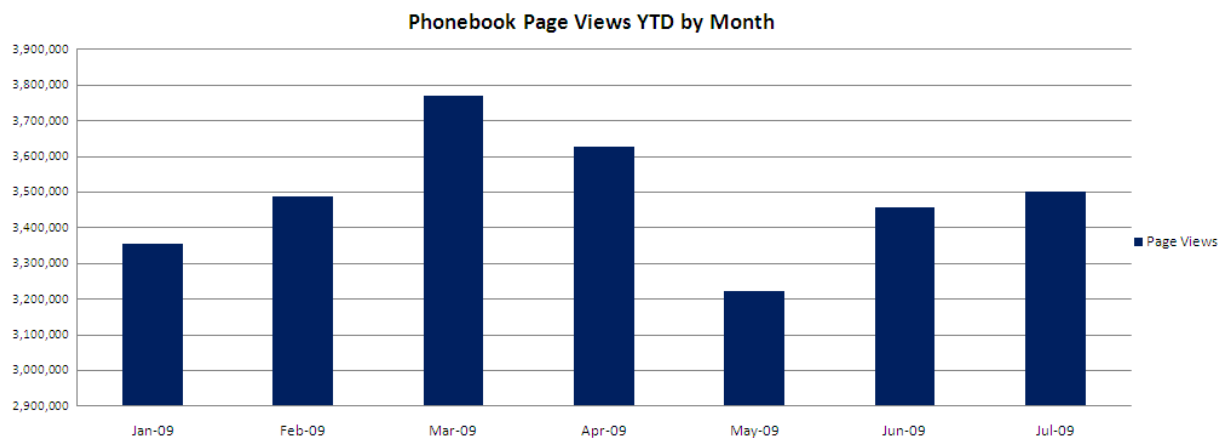
Pictured: Calendar year 2009 usage metrics of *FastJump* keyword navigation.



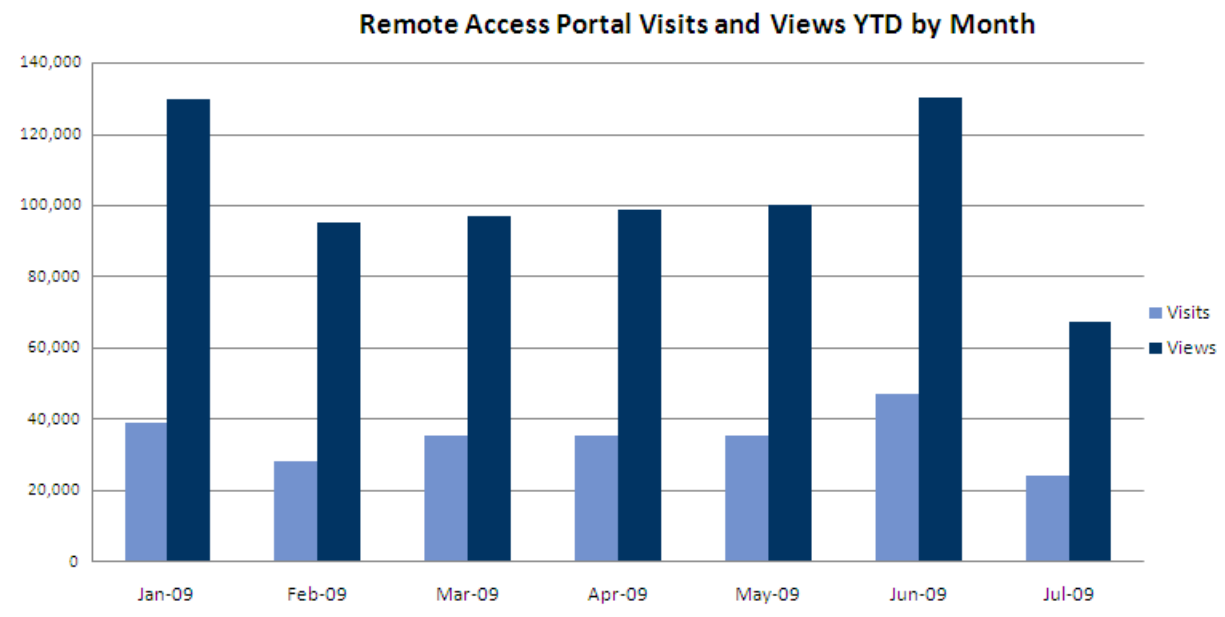
Pictured: Calendar year 2009 usage metrics of the *onomi* social bookmarking tool.



Pictured: Calendar year 2009 usage metrics of *onomi* user data.



Pictured: Calendar year 2009 usage metrics of the *Phonebook* (corporate directory) application.



Pictured: Calendar year 2009 usage metrics of the Remote Access Portal.

Howard Hughes Medical Institute (2010)

Using the intranet:

Howard Hughes Medical Institute (HHMI) is a nonprofit medical research organization that ranks as one of the nation's largest philanthropies and plays a powerful role in advancing biomedical research and science education in the US. Over the past two decades, HHMI has made investments of more than \$8.3 billion for the support, training, and education of the nation's most creative and promising scientists. The Institute employs about 3,000 people, commits more than \$700 million a year for research, and distributes \$100 million in grant support for science education.

Headquarters: Chevy Chase, Maryland

Number of employees the intranet supports: 3,000

Company locations: Across the US

Locations where people use the intranet: More than 70 US locations

Annual disbursements:

HHMI commits more than \$700 million a year for research and distributes \$100 million in grant support for science education.

Design team:

TandemSeven did the design and requirements gathering for the project. TandemSeven and CapTech Ventures (subcontracted through TandemSeven) jointly handled the technical architecture and implementation. An in-house team assisted with all aspects of the project.

In-house team members: Leslie Forte, Director, Web Applications; Alycia Eck, Senior Intranet Editor; Kris Weinhold, Senior Web Applications Developer; Kate Forte, IT, Project Leader; Dave Tabor, Manager, Web Engineering; Bill Dorris, Senior Project Leader Oracle

TandemSeven design team: Kenneth McDowell, Principal User Experience Architect; Andrew Schechterman, Senior User Experience Architect; Paul Eisen, Principal User Experience Architect; Carrie Notte, Principal Visual Designer; Frank Donofrio, Senior Visual Designer

Technology team: Stephen Wyman, Vice President and Project Manager, TandemSeven; Alessandro Barroso, Technical Architect, TandemSeven; Ron DiFrango, Technical Architect, CapTech Ventures; Scott Duncan, Content Manager, CapTech Ventures; Niran Fajemisin, Principal Technical Architect, TandemSeven; Phil Kedy, Lead Technical Architect, CapTech Ventures; Mundi Morgado, Principal Technical Architect, TandemSeven; Vincent Schoenfelder, Solution Architect, CapTech Ventures

SUMMARY

Not every intranet team talks about fulfilling the “behavioral, intellectual, and emotional needs” of its users, but that’s exactly what the team behind the intranet for Howard Hughes Medical Institute (HHMI) considered when building the site. Inspired by the Institute’s philanthropic work, team members worked closely with employees to understand the needs of users, from biomedical scientists to researchers to support staff. Even “pre-employees” have limited access to the site, with access planned for outside vendors and collaborators as well. The team strove to create a site to support all users and fill the unique needs of the Institute.

Site use varies from users who manage large amounts of data to more traditional users who check benefits information and news headlines to users managing projects through the site or tracking vendors. Given the nature of the organization, much information on the intranet is sensitive, so providing the right information to the right audience is crucial. As such, personalization is integral to the site’s structure, with permissions set for individuals and groups.

The HHMI homepage emphasizes the site’s personal aspect, with information directed at the individual. The site is structured to allow quick access to personal content via the *My Home*, *My Department*, and *My Projects* tabs, making the most relevant information on the site easy to quickly access.

Users can customize the homepage to reflect their own priorities by moving content portlets or reorganizing the information within them. (The functionality to add and remove portlets is developed, but not yet in production.) For instance, users can customize a list of *My Bookmarks* with shortcuts to important content and can prioritize the links within that list. Tools such as *My Recent Pages* give users one-click access to pages recently visited, on the assumption that if users visit the page once, they might need that information again. A list of popular pages leads to commonly used site areas, including *Forms*, *Policies*, and the *PeopleFinder* employee directory.

The body of the *My Home* page contains *News and Updates* front and center, always providing new information for users to view. A rotating view shows users multiple featured stories. The area's design lets users see each featured article's headline. Users can click on any headline (whether it's in the main pane or not) or page through the headlines at their own pace. When headlines are featured in the main pane, they're accompanied by brief blurbs with key information and relevant links to more information.

HHMI news is featured below the update area, with concise headlines, clear blurbs, and the date and time the information was posted. Users can scroll through the latest headlines or follow the link to view all news headlines. Other areas feature up-to-date information, such as the fitness schedule, lunch menu, and weather. Everything on the page is relevant, personal, and up-to-date.

Navigational options appear in the upper right-hand corner of the page, with menus giving users direct access to content within those sections. There's also a prominent link to *Benefits* information at the top of the page. This placement, separate from all the other links, indicates that the benefits and payroll information is being drawn from a separate, third-party application. *MyHHMI* provides a number of convenient points of integration for this information, including the pervasive link in the header.

A link above the main site search lets users go directly to *PeopleFinder*, the employee directory. This link is accompanied by links to the public site, *HHMI.org*, *Help* information and a link to *Logout*—which is particularly important in a single sign-on environment where secure information can be accessed.

HHMI.org PeopleFinder Help Logout

MYHHMI

Eisen, Paul S | Wednesday, July 1, 2009

DEPARTMENTS LOCATIONS DOCUMENTS APPLICATIONS I NEED TO...

MY HOME MY DEPARTMENT MY PROJECTS

Home > My Home

Print... | Bookmark page

MY BOOKMARKS

- Archive To Be
- User Experience Empori...
- View user resources
- Hockey pool
- Learn about HHMI secur...
- Class Schedule
- Headquarters
- Lunch Menu

EDIT BOOKMARKS | ADD BOOKMARK

MY RECENT PAGES

- My Home
- MTA Status Viewer
- Applications
- Documents
- Tax Compliance


CLEAR RECENT PAGES

POPULAR PAGES

- Financial Accounts Structure
- HHMI Forms
- HHMI Policies
- HQ Fitness Center
- HQ Lunch Menu
- PeopleFinder
- Purchasing Department
- SAR
- User Resources

MY HOME


NEWS & UPDATES




2009 HHMI Family Picnic

Join us for the annual HHMI Family Picnic at Smokey Glen Farm on Friday, July 17, from noon to 5 p.m. For more details on the menu, games and activities, directions, and to RSVP, visit [the picnic site](#). [More...](#)


FEATURE ARTICLES



2009 HHMI Family Picnic



Time for the May '09 HHMI Bulletin



Coming Soon! HQ Staff Book Fair

VIEW ALL | < >

HHMI NEWS (FROM WWW)

[Eat Less, Live Longer: Unraveling the Connection](#)
 Researchers have identified two proteins that begin to explain how radically slashing calories leads to a longer life.
 Wed Jun 24 14:00:00 EDT 2009

[Massagué to Receive Frontiers of Knowledge Award](#)
 Joan Massagué honored for elucidating one of the fundamental processes that control cell division.
 Wed Jun 17 18:58:00 EDT 2009

[New Strategy Rapidly Reveals Targets for MicroRNA Gene Regulation](#)

VIEW ALL HHMI NEWS

FITNESS SCHEDULE

Wednesday (July 1)

M T W T H F

Spin : Rosa
 12:00 PM to 12:30 PM

15-min Abs : Erryn
 12:30 PM to 12:45 PM

Spin : Rosa
 12:45 PM to 1:15 PM
 Sign-up required

VIEW FULL SCHEDULE | FITNESS HOME

POPULAR APPLICATIONS

- ERM (via Citrix)
- FAS (Financial Account Structure)
- MeetingPlace
- PSFT Financials
- PSFT HRMS
- Resource Scheduler

LUNCH MENU

Wednesday (July 1)

M T W T H F

Soup : Black Bean Soup	\$1.00
Salads or Sandwiches : Greek Chicken Salad	\$2.50
Salads or Sandwiches : Shrimp Salad in Pita	\$2.50
Entrees : Fish & Chips	\$2.50
Entrees : Veal Parmigiana	\$3.50
Dessert : Peach Cobbler	\$1.50

Items shown in orange are vegetarian

Side dishes are \$1.00

Lunch: 11:30 a.m. to 2:00 p.m.

VIEW FULL MENU

JOBS @ HHMI

Library Specialist
 Ashburn, Virginia





Research Technician III
 La Jolla, California

Shuttle Driver
 Chevy Chase, Maryland

Research Specialist, Neural Imaging and Physiology in Drosophila
 Ashburn, Virginia

VIEW ALL JOBS

WEATHER

Today	Thu	Fri	Sat
			
84° 66°	80° 64°	83° 66°	87° 66°

Chevy Chase, MD (20815)

CURRENT CONDITIONS:
 77 degrees. Partly Cloudy. Feels like 78 degrees. Winds: CALM 0 MPH.
 Humidity: 56%

HOME | DEPARTMENTS | LOCATIONS | DOCUMENTS | APPLICATIONS | I NEED TO... | PEOPLEFINDER | HELP

HHMI Emergency Site | Copyright © 2009 Howard Hughes Medical Institute. All rights reserved.

Pictured: The *MyHHMI* homepage presents relevant, personalized, and customizable information to the user, providing quick access to departmental content, project information, and areas of personal interest.

On many intranets, department pages simply define what the department does and link to contact information or forms created by the department. *MyHHMI* has similar

pages, but also adds a feature called *My Department*. These workspaces are intended for each department's internal use. Employees within a department are provided tools, information, and team collaboration spaces essential to their department. The page included below shows the Information Technology department page in its early stages, when, as the page notes, "we expect to add more portlets, content and functionality." Although the page shown was only recently added, it already contains helpful information, including a group calendar with employee schedules that indicates who's working from home, taking a flex day, or has personal time off. Shared documents are also featured, along with a full contact list for the department.

IT Quick Links direct employees straight to the tools of most interest to the group, such as *Cisco Call Manager* and *Network Change Control*. Messages on the page and in the portlets make it clear that content owners are open to suggestions for what to add, remove, or feature on the page. For instance, a note to *email Kate* if they want to add to a list of *Quick Links* shows employees that they can have an impact on what appears on the page. This changes the *Quick Links* from a potentially static piece of content to a list that can be influenced by employee needs. Asking for feedback on a site, even in little ways like this, can go a long way toward making users view the site as a helpful tool rather than something they have to use.

The page is rounded out by a tech tip and RSS feed from CNET, making it a nice combination of useful content, practical details, and helpful shortcuts.

A defining element of the HHMI intranet is that it allows users to create, share, and view project information through the site. Employees have a *My Projects* tab, which shows all projects for which the employee is a manager or a member. Employees can set up new projects as well. The employee who sets up the project is automatically the manager, and other members can be designated for the project and given specific permissions for seeing, using, or editing the project's content.

The *My Projects* page shows users all of their projects, with start and end date, manager's name and email link, and status information. A projects calendar lets users view all projects on a single calendar. Projects are color-coded to help users distinguish them from one another. Users can view all projects, no projects, or selected projects. This allows employees juggling multiple projects to see all meetings and calendar items in one view.

Project tasks are listed as well. Simple checkboxes let users choose whether they want to view only tasks assigned to them or view all tasks, as well as to view open tasks, completed tasks, or both. Completed tasks are indicated with a green checkmark next to them, while exclamation points indicate items that are overdue.

Each project page lists tasks for the specified project only; there's also an aggregated view of all of a user's projects and associated tasks on the landing page for the *My Projects* workspace. In the aggregated view, users can sort tasks by project.

Project managers can add or remove project members and assign particular permissions based on user types. The *Project Team Portlet* lets users search for team members based on first or last name, department, or site or OAS location. A link to *PeopleFinder*, the site's complete employee directory, is provided to help anyone having trouble locating a team member using the portlet.

Team members can be added to the project and assigned a role within the project. Employees can be designated as member or manager, or can be given *View Only* access, meaning that they can't make any changes to the project site, but they can view it. Managers have rights to view, create, edit, delete, or archive information. Team members can do everything other than archive.

The roles are predefined combinations of access. People's roles can be changed among the access levels: manager (full access), member (add, edit, and delete, but not manage or archive), and view-only, but a project manager can't subselect types of access within access levels.

Managing access rights can be a tricky and complex task, but the site has simplified it to a handful of roles with defined access. Managing team members on the project page is as easy as adding them, assigning a role, and clicking the *Save* button.

The screenshot shows the 'TEAM' portlet interface. At the top, there's a title bar 'TEAM' and a subtitle 'ADMIN SETTINGS: CHANGE SETTINGS FOR EVERYONE'. Below this are search filters: 'First name', 'Last name', 'Department' (set to 'All departments'), and 'Site or OAS Location' (set to 'Brigham & Women's Hospital'). There's a link to 'Use PeopleFinder' and a 'SEARCH FOR TEAM MEMBERS' button. Below the search filters is a section titled 'PROJECT TEAM ASSIGNMENTS'. It contains a table with columns 'Name', 'Phone/Email', and 'Role'. The table lists seven team members: DiFrango, Ron; Duncan, Scott; Eisen, Paul; Fajemisin, Niran; Kedy, Philip; Schoenfelder, Vinnie; and Wyman, Steve. Each member has a role dropdown menu, mostly set to 'Team member', with 'Eisen, Paul' set to 'Manager'. Below the table is a horizontal scrollbar. At the bottom, there's a table titled 'HAS RIGHTS TO' with columns 'ROLE', 'View', 'Create', 'Edit', 'Delete', and 'Archive'. The table shows permissions for 'Manager', 'Team member', and 'View Only' roles. 'Manager' has rights to View, Create, Edit, Delete, and Archive. 'Team member' has rights to View, Create, Edit, and Delete. 'View Only' has rights to View. There are 'SAVE' and 'CANCEL' buttons at the bottom right.

ROLE	View	Create	Edit	Delete	Archive
Manager	•	•	•	•	•
Team member	•	•	•	•	
View Only	•				

Pictured: The *Project Team Portlet* allows the project manager to easily add project team members and assign roles and their associated permissions.

Project pages are a central location for teams to share and collaborate. Project pages can incorporate team calendars, shared links to resources, project notes, shared documents, and complete project task lists. A list of all team members allows quick access to contact information for each member. Project managers can make a

project inactive—meaning it’s invisible to others—or archive the project at its conclusion. A single button enables project managers to email the full team, allowing quick communication.

Having a single place to view information about the project helps keep all team members up-to-date and informed while sharing knowledge across the team.

The screenshot shows the MYHHMI project page for 'LOGISTICS PLANNING'. The page is divided into several sections:

- Header:** MYHHMI logo, navigation tabs (DEPARTMENTS, LOCATIONS, DOCUMENTS, APPLICATIONS, NEED TO..., BECKY'S PAGE), and a search bar.
- Left Sidebar:** MY BOOKMARKS (Logistics Planning, June Test, All Singing All Dancing 2, Meeting Services Docum..., HHMI WWW site, Locations, Policies), MY RECENT PAGES (My Projects, My Home, MTA Status Viewer, Documents, Coanos Reports (Coanos)), and POPULAR PAGES (Financial Account Structure (FAS), HHMI Policies, HQ Fitness Schedule, HQ Lunch Menu, My Benefits, PeopleFinder, Purchasing Department, Systems Access Request (SAR)).
- Main Content Area:**
 - PROJECT OVERVIEW:** A section titled 'Planning is believing!' with a description of the Logistics Planning Project as a comprehensive, global multi-modal transport and logistics solution.
 - CALENDAR PORTLET:** A calendar view for June 29 - Jul 3, 2009. It shows events like '10:00 AM - 12:00 PM Review' on Thursday and '12:00 PM - 01:00 PM Lunch and Learn' on Wednesday.
 - TEAM:** A table listing team members:

Name	Department/Location	Role	Phone/Email
DiFranco, Ron	Information Technology	Member	
Duncan, Scott	Information Technology	Member	
Eck, Alycia	Information Technology	Member	
Eisen, Paul	Information Technology	Manager	
 - SHARED DOCUMENTS:** A table listing documents:

Folder/Document	Size	Uploaded On	Uploaded By	Actions
Logistics				
Annual				
Daily				
Monthly				
Weekly				
Meeting Minutes				
August Planning Sessions				
Logo_40whit.gif	3K	06/23/2009	Wyman, Steve	
Picture 1 blurred.png	97K	06/23/2009	Wyman, Steve	
hfig_banner.jpg	31K	06/23/2009	Wyman, Steve	
July Planning Sessions				
June Planning Sessions				
 - TASK:** A table listing tasks:

Status	Task	Created By	Assigned To	Start Date	Due Date	Actions
	Secure facilities	Eisen, Paul S	Wyman, Steve	Jun 15, 2009	Jun 01, 2009	
✓	Report on alpha	Eisen, Paul S	Duncan, Scott	Jun 15, 2009	Jun 10, 2009	
	New task	Eisen, Paul S	Not Assigned	Jun 17, 2009	Jun 17, 2009	
	Distribute planner	Eisen, Paul S	Eck, Alycia J	Jun 15, 2009	Jun 18, 2009	
	Present survey	Eisen, Paul S	Schoenfelder, Winnie	Jun 15, 2009	Jun 19, 2009	
- Right Sidebar:** MY PROJECTS MANAGER (All Singing All Dancing 2, Becky, EB Proj, Logistics Planning, Revenger of MyHHMI UI Design), Actions (Create new project..., Make inactive, Email team..., Archive project), View/Hide Portlets (Overview, Calendar, Team, Documents, Tasks, Resources, Notes), LOGISTICS RESOURCES (FFC - Planning and Logistics, Infor Transport and Logistics, SCL Canada, European Logistics Association, Humanitarian Logistics Association, HHMI Purchasing Chart, Purchasing Department, Purchasing Chart), and PROJECT NOTES (All registrations for winter logistics s..., Paul Eisen, Jun 16, 2009, 9:03 AM, There is a seminar on Tuesday June 23rd..., Scott Duncan, Jun 16, 2009, 8:48 AM, Feed Your Brain session for this month L..., Scott Duncan, Jun 16, 2009, 8:46 AM, Noteworthy is the section of backup off..., Paul Eisen, Jun 15, 2009, 5:16 PM, Porous remains of the anticlotted second...).

Pictured: Project pages summarize key information and allow for shared resources, including task lists, notes, calendars, and documents.

The site has a clean design throughout, making it easy for users to move from page to page without having to determine how each page works. Consistent navigation lets users know where they are on the site. The text color changes in the currently selected tab and local navigation appears on the side of the page, above the other page portlets. Breadcrumb navigation also shows users where they are in the site, indicating their current location. Breadcrumbs are nicely placed between the top navigation and side navigation.

The site makes it easy to find and use standard intranet information as well as the personalized content. Even pages with standard intranet fare are often enhanced with high-quality content. For instance, each location has its own page on the site, providing information both for and about that location. The Headquarters page shows a picture and address, but also offers information helpful to anyone coming to Headquarters, whether an HHMI employee, vendor, or visitor.

The page provides local accommodation and restaurant recommendations. Facts about the location give brief historical or interesting facts about the site, and directions and a map give users quick access to essential information for arriving at the office on time and without trouble. *Quick Links* lead to popular or important content, such as the shuttle schedule, holiday schedules, and recycling guides. The daily menu provides updated content on what could otherwise be a relatively static page.

The use of portlets for conveying information gives every page a similar clean design. Each portlet has a clear title in the title bar, and consistent colors for text, links, and design elements make the page easy to scan and quickly understand.

HHMI.org PeopleFinder Help Logout

MYHHMI

Eisen, Paul S | Thursday, July 2, 2009

DEPARTMENTS LOCATIONS DOCUMENTS APPLICATIONS I NEED TO...

MY HOME MY DEPARTMENT MY PROJECTS

Home > Locations > Headquarters

LOCATIONS

- Headquarters
 - HQ Family Picnic
 - HQ Expansion
 - Fitness Center
 - Mailroom
 - Lunch Menu
 - Institute Calendar

MY BOOKMARKS

- Archive To Be
- User Experience Empori...
- View user resources
- Hockey pool
- Learn about HHMI secur...
- Class Schedule
- Headquarters
- Lunch Menu

EDIT BOOKMARKS | ADD BOOKMARK

MY RECENT PAGES

- Headquarters
- My Home
- MTA Host Assignments
- General Counsel
- MTA Status Viewer

CLEAR RECENT PAGES


POPULAR PAGES

- Financial Accounts Structure
- HHMI Forms
- HHMI Policies
- HQ Fitness Center
- HQ Lunch Menu
- PeopleFinder
- Purchasing Department
- SAR
- User Resources

HEADQUARTERS (005)

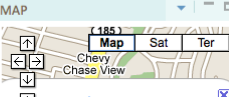
The Institute's Chevy Chase facility houses HHMI's administrative offices and provides a place for its scientists and others related to its programs to meet to discuss their research. The Institute has about 190 administrative employees on-site. There is no research conducted at the campus.

VISIT US



Headquarters
4000 Jones Bridge Rd
Chevy Chase, MD 20815

MAP



Address: 4000 Jones Bridge Rd
Chevy Chase, MD 20815

Get directions: [To here](#) - [From here](#)
[Search nearby](#) - [Zoom here](#)

LOCAL RECOMMENDATIONS

Local Hotels

Bethesda Marriott
Phone: (301) 897-9400

Hyatt Bethesda
Phone: (301) 657-1234

Local Restaurants

Headquarters Cafeteria

HQ FACTS

The site

- Originally 22.4 acres, at the intersection of Connecticut Avenue and Jones Bridge Road in Chevy Chase, Maryland
- 1999: the Institute purchases the Platt property, 4.6 acres adjacent to original parcel

DIRECTIONS

Directions from BWI airport to the Headquarters:

- Start out going West towards I-195 W by turning left.
- Stay straight to go onto I-195 W.
- Take the I-95 SOUTH exit, exit number 48, towards WASHINGTON.
- Merge onto I-95 S. Continue on 95 S. for 19 miles
- Take the I-495 WEST exit, exit number 27-25, towards COLLEGE PARK(US-1)/SILVER SPRING.

QUICK LINKS

- HQ Shuttle Schedule
- 2009 HHMI Holiday Calendar
- HQ Phone List
- HQ Recycling Guide
- HQ Fitness Schedule
- Supply Order Form

LUNCH MENU

Thursday (July 2)

M T W T H F	
Soup : Soup du Jour	\$1.00
Salads or Sandwiches : Waldorf Salad	\$2.50
Salads or Sandwiches : Chicken & Mozzarella Salad	\$2.50
Entrees : Chicken Fajitas	\$2.50
Entrees : Crab Cakes	\$3.00
Vegetarian : Stuffed Peppers	\$2.00
Vegetarian : Multi Pasta au Gratin	\$1.00
Dessert : Cheesecake	\$1.50

Items shown in orange are vegetarian
Side dishes are \$1.00
Lunch: 11:30 a.m. to 2:00 p.m.

[VIEW FULL MENU](#)

AED LOCATIONS

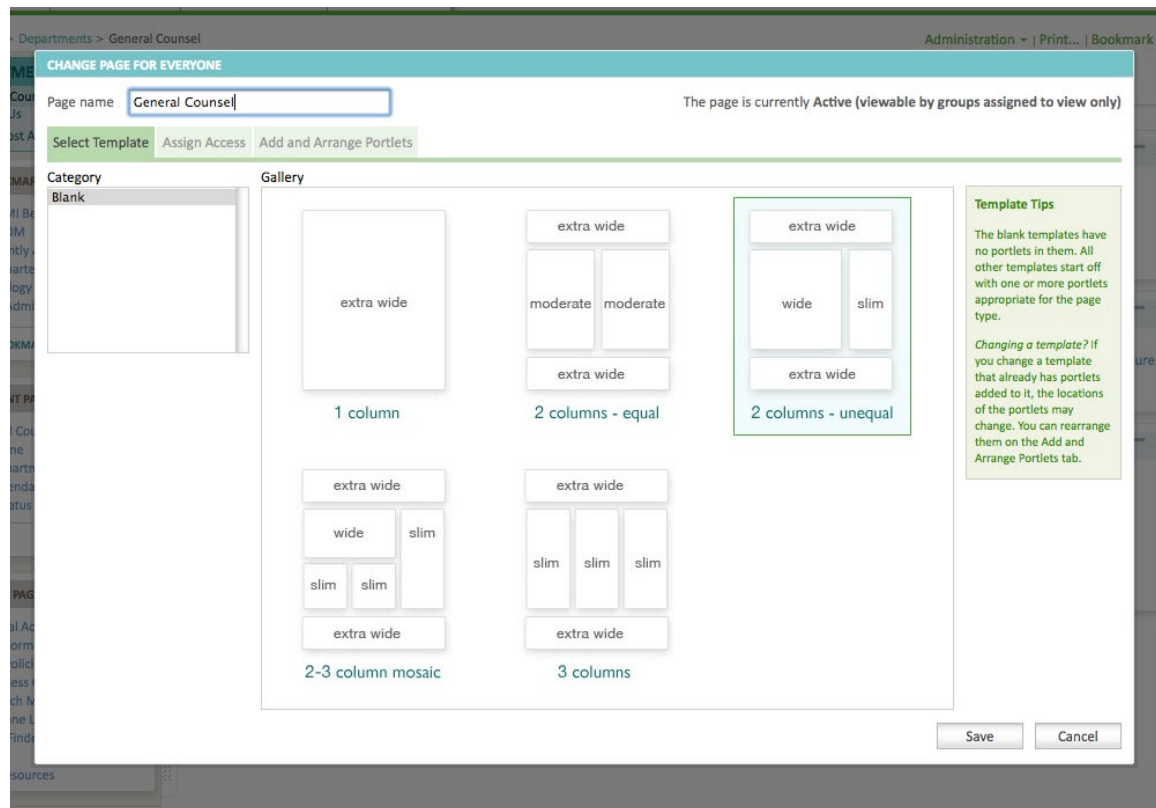
An Automated External Defibrillator (AED) is a portable automatic device used to restore normal heart rhythm to patients in cardiac arrest. In case of an emergency, it's smart to know the closest one at hand. In total, there are fourteen AEDs around Headquarters:

1. Accounts Payable (outside A159)

Pictured: Location information goes beyond just an address. It includes location facts, directions, lunch menus, and more.

Content contributors are scattered throughout the organization. The team thought it essential that contributors could edit within the site itself, so making changes would be as simple as possible. Easy administrator interfaces and usable editing tools encourage contributors to take charge of their own content.

Content contributors can edit content through their site, and can send a preview of the changes to selected reviewers. Administrators can use the portal interface to select from one of several page templates, which allows some variety while still restricting page design to ensure site consistency. Simple diagrams show what each option looks like. Administrators can easily select a template, assign access to it, and then fill the template with content by adding content portlets.



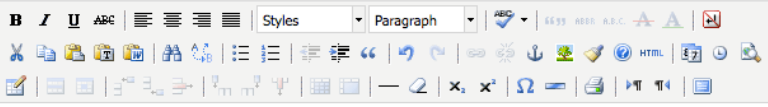
Pictured: Administrators choose from a pre-defined selection of page templates.

Contributors don't need to learn a separate CMS to make changes. All options are within the site and are built with the user in mind. Content edits are simple. Users simply need to fill in a form. If users know how to use standard text editing tools, they can create areas of content on the site. The content form requests a title and abstract, and then provides a large open field for text entry. The WYSIWYG editing tool lets users change text colors, add links, use bold or italics, and many other actions through a simple interface. Users attach keywords to the content as well, which allows authors to tag content with terms not included in the text. Users can also select the appropriate department and document type. The tagging facilitates the faceted searching in the *Documents Catalog* and general search areas.

Title *
Welcome to Accounts Payabls

Abstract *
Welcome to Accounts Payable

Text *

B I U ABC | **Styles** | Paragraph | 

The Accounts Payable department is responsible for the timely and accurate processing of invoices in order to pay vendors and reimburse employees in accordance with established policies. They are also responsible for preparing and distributing checks; all disbursements are based on authorizations from the appropriate delegated authority and within established internal control procedures.

Take a Video Tour of AP
Spend some time with the Accounts Payable Department; see what happens "All in a Day's Work." To play the video, press the > (play) button on the control panel in the RealPlayer plug-in shown below.

If you currently have RealPlayer installed on your PC, the video will start immediately. If you do not have Real Player, either call or [e-mail](#) the Help Desk.

Path: p

Keywords

Department * **Accounts Payable**

Document Type * **Other**

Save as Draft Cancel

Pictured: Simple text editing tools make the task of updating or adding content to the HHMI intranet easy.

Knowledge, often in the form of documents, is essential to getting work done. At HHMI, the sheer number of documents and need for them to be easily accessible inspired the team to design a tool that they kept tweaking to ensure the best possible experience for users. The *Documents Catalog* allows users to search by both keywords and criteria. The tool is constructed around a faceted search that lets users select particular document criteria to narrow their search results. Users can search within a department or for a particular document format (such as Word) or document type (such as policy). Users can search unrestricted documents or protected documents, but see only the secure results that they have access to. Users can also search by publish date, recent documents, or all documents.

The faceted search acts as an advanced search, but in a simplified presentation. On most intranets, users need to click an *Advanced Search* link to see additional options for narrowing searches. By using faceted navigation, those advanced criteria are not only visible, but easy to understand and use. Users can choose to run the equivalent of a simple search by not selecting any criteria. Or, they can narrow their results to meet their specific needs by making selections. During the design testing, the team realized that it was important to users to not only select multiple criteria, but also to select several options within a specific criterion. For instance, users might want to

find secure Word and Excel files that had been recently updated. The presentation of the faceted search makes this easy and intuitive.

Users can make any selections from the criteria on the side of the page and use the *Go* button to submit the search. The search results page shows the total number of documents found, displaying 50 results at a time. In addition to filtering results, users can sort the documents found by title, department, format, publish date, or type.

HHMLorg
PeopleFinder
Help
Logout

MYHHMI

Eisen, Paul S | Wednesday, July 1, 2009

DEPARTMENTS
LOCATIONS
DOCUMENTS
APPLICATIONS
I NEED TO...

MY HOME
MY DEPARTMENT
MY PROJECTS

Home > Documents

Print... | Bookmark page

REFINE DOCUMENT SEARCH

SEARCH
Document contains:
Go

DOCUMENT TYPE
All document types
Form
Policy
How To
Record
Other
Go

DEPARTMENT
All departments
Accounts Payable
Application Security
Archives
Banking Office
Budget Office
Business Systems Support
Communications
Facilities
Finance
General Accounting
General Counsel
Grants
HHMI Institute wide
Help Desk
Human Resources
Information Technology
Internal Audit
Investment
Library
Meeting Services
Office of the President
Payroll
Purchasing
Records
Science
Tax Compliance
Travel
Go

FORMAT
All formats
Web Content
PDF
Microsoft Word
Microsoft Excel
Go

SECURITY
Open
Restricted
Go

PUBLISH DATE
Any date
Within the past week
Within the past month
Within the past 3 months
Within the last year
Go

DOCUMENTS CATALOG
Narrow your search using the choices on the left.

We found 605 matches for all documents. Search again?

1 to 50 of 605 documents listed

PREVIOUS | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | NEXT | VIEW ALL

Title	Department	Format	Published	Type
AD-200 Delegation of Authority Scope	Office of the President	Web Content	Jun 29, 2009	Policy
AD-205 Appropriations	Office of the President	Web Content	Jun 29, 2009	Policy
AD-210 Other Agreements	Office of the President	Web Content	Jun 29, 2009	Policy
AD-215 Banking Transactions	Office of the President	Web Content	Jun 29, 2009	Policy
AD-220 Government Filings	Office of the President	Web Content	Jun 29, 2009	Policy
AD-225 Table of Delegations	Office of the President	Web Content	Jun 29, 2009	Policy
AD-230 Policy Development Review and Approval	General Counsel	Web Content	Jun 29, 2009	Policy
AD-310 Scope of Policy and General Description	Office of the President	Web Content	Jun 30, 2009	Policy
AD-320 Activities Covered by this Policy	Office of the President	Web Content	Jun 30, 2009	Policy
AD-330 Approval and Implementation Procedures	Office of the President	Web Content	Jun 30, 2009	Policy
AD-340 Use of Confidential Information, and Communications with the Investment Department	General Counsel	Web Content	Jun 30, 2009	Policy
AD-341 Insider Trading - Appendix A	General Counsel	Web Content	Jun 30, 2009	Policy
AD-350 Prohibition Against and Reporting of Financial Fraud	Office of the President	Web Content	Jun 29, 2009	Policy
AD-400 Travel General Description	Finance	Web Content	Jun 30, 2009	Policy
AD-410 Travel Standards	Finance	Web Content	Jun 30, 2009	Policy
AD-420 Automobile Usage and Mileage Reimbursement	Finance	Web Content	Jun 30, 2009	Policy
AD-430 Travel Approval	Finance	Web Content	Jun 30, 2009	Policy
AD-440 Advance Payment for Travel	Finance	Web Content	Jun 30, 2009	Policy
AD-600 Use of HHMI Name	Office of the President	Web Content	Jun 30, 2009	Policy
AD-610 Use of HHMI Name - Attachment	Office of the President	Web Content	Jun 30, 2009	Policy
AD-700 Use of HHMIs Chevy Chase Campus By Other Organizations	Office of the President	Web Content	Jun 23, 2009	Policy
AD-700 Use of HHMIs Chevy Chase Campus By Other Organizations	Office of the President	Web Content	Jun 23, 2009	Policy
AD-701 Use of HHMIs Janella Farm Research Campus by Other Organizations and Other HHMI Locations	Office of the President	Web Content	Jun 23, 2009	Policy
AD-800 Maintenance and Security of Personal Information	Office of the President	Web Content	Jun 23, 2009	Policy
AD-810 Reimbursement for Home Internet Access	Office of the President	Web Content	Jun 23, 2009	Policy
AD-820 Issuance of IT Equipment at Headquarters and QAs for Use Offsite	Office of the President	Web Content	Jun 23, 2009	Policy
AM-020 Asset Disposal and Transfer Request	Finance	Microsoft Excel	May 19, 2009	Form
AM-025 Property Donation Form Letter	Finance	Microsoft Word	May 19, 2009	Form
AM-030 Letterhead/Laser - Decal Notice	Finance	Microsoft Excel	May 19, 2009	Form
AM-090 Location Code Request Form	Finance	Microsoft Excel	May 19, 2009	Form
AM-120 Asset Classifications	General Accounting	Web Content	Jun 23, 2009	Policy
AM-130 The Use of Decals to Identify Certain Assets	General Accounting	Web Content	Jun 23, 2009	Policy
AM-175 Decal Action Request	Finance	Microsoft Excel	May 19, 2009	Form
AM-200 Fixed Asset Inventory Report	Finance	Microsoft Excel	May 19, 2009	Form
AM-200 PeopleSoft Asset Management System	General Accounting	Web Content	Jun 23, 2009	Policy
AM-300 Monitoring Equipment, Furniture, Fixtures, and Vehicles	General Accounting	Web Content	Jun 23, 2009	Policy
AM-310 Monitoring Leasehold Improvements	General Accounting	Web Content	Jun 23, 2009	Policy
AM-400 Depreciation, Amortization, and Closings	General Accounting	Web Content	Jun 23, 2009	Policy
AP Standard Comments	HHMI Institute wide	PDF	Apr 27, 2009	How To
AP Standard Comments	HHMI Institute wide	PDF	Apr 27, 2009	How To
AP-011 Payment Request Form	Accounts Payable	Microsoft Excel	May 19, 2009	Form
AP-012 Grants Payment Request Form	Grants	Microsoft Excel	May 19, 2009	Form
AP-013 Summer Student Payment Request Form	Accounts Payable	Microsoft Excel	May 19, 2009	Form
AP-015 Travel Advance Request Form	Accounts Payable	Microsoft Excel	May 19, 2009	Form
AP-020 Travel and Other Business Expense Report (TOBER)	Accounts Payable	Microsoft Excel	Jun 04, 2009	Form
AP-052 Non-PO Invoice Processing Form for Janella Farm	Accounts Payable	Microsoft Excel	May 19, 2009	Form
AP-100 Overview	Accounts Payable	Web Content	Jun 23, 2009	Policy
AP-110 Standards of Business Conduct for Accounts Payable Personnel	Accounts Payable	Web Content	Jun 23, 2009	Policy
AP-110 Standards of Business Conduct for Accounts Payable Personnel	Accounts Payable	Web Content	Jun 23, 2009	Policy
AP-175 Request for Stop Payment/Void	Accounts Payable	Microsoft Excel	Jun 04, 2009	Form

1 to 50 of 605 documents listed

PREVIOUS | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | NEXT | VIEW ALL

Pictured: The *Documents Catalog* lets users do a standard keyword search or specify certain attributes, such as document type or format.

The site also offers a federated site search. The team implemented “search as you type” results to give users quick access to the information they needed, with the additional option to submit the search and see a complete search results page. The top five matching results appear in a box beneath the search box as the user types. Users can go quickly to one of these top results or click *Go* to submit the search and see the full search results page.

This added feature was particularly helpful for conducting speedy people searches or searches for particular pieces of information where a specific keyword was known. For instance, if users were looking for Becky Smith’s phone number, they could see her result pop up as they were typing her name. If they were looking for a particular document with a known title, they could enter the title and see results without even having to click through to the search results page.

Designs like this, when well implemented, can go a long way toward making the site even easier to use. Attention to small design details goes beyond just letting users get the information they need; it makes the task as simple and quick as possible.

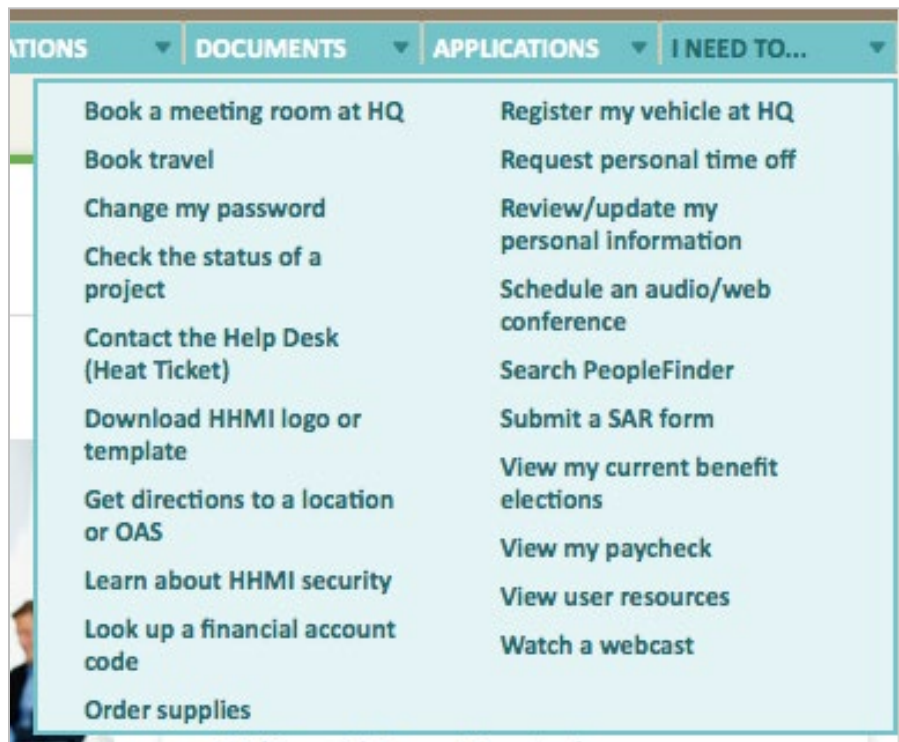
The screenshot shows the MYHHMI website interface. At the top, there's a navigation bar with "MY HOME", "MY DEPARTMENT", and "MY PROJECTS". Below this is a search bar with the text "Q compliance" and a "GO" button. To the right of the search bar, a dropdown menu titled "PEOPLEFINDER (11 matches)" is visible, showing a list of people with their names, titles, and locations. Below the search bar, there's a "DOCUMENT CATALOG (325 matches)" section with a list of documents. The main content area on the left is titled "MY HOME" and includes sections for "NEWS & UPDATES", "FEATURE ARTICLES", "HHMI NEWS (FROM WWW)", and "FITNESS SCHEDULE". A sidebar on the far left contains "MY BOOKMARKS", "MY RECENT PAGES", and "POPULAR PAGES".

Pictured: The quick search panel appears as users type their search queries, presenting them with the top-five people and document matches for a particular query.

In creating the new site, the HHMI intranet team considered not only how the site would work on its own, but also how it would work compared to the previous site. Many intranet teams fail to adequately consider the full impact of a new intranet. No matter how bad a previous intranet might have been, employees were used to it. Even if an intranet changes from a static, out-of-date, irrelevant tool to a dynamic, engaging, efficient one, users know how to use the old site and often react badly to the new site. The transition can be difficult, particularly if little is done to engage, prepare, or support users in the transition.

In addition to including various users from different areas of the organization in planning for the new site, the HHMI intranet team took several other steps to engage the audience.

When the new site launched, the team knew users would be reluctant to spend time “learning” the new site, no matter how intuitive the site structure was. To facilitate the transition, team members created an *I Need To* menu. They did this to help ease users’ struggles to find information they previously knew how to locate and needed on a regular basis. The menu appears in the main site navigation and lets users do critical or common tasks like book travel, schedule a Web conference, or order supplies.

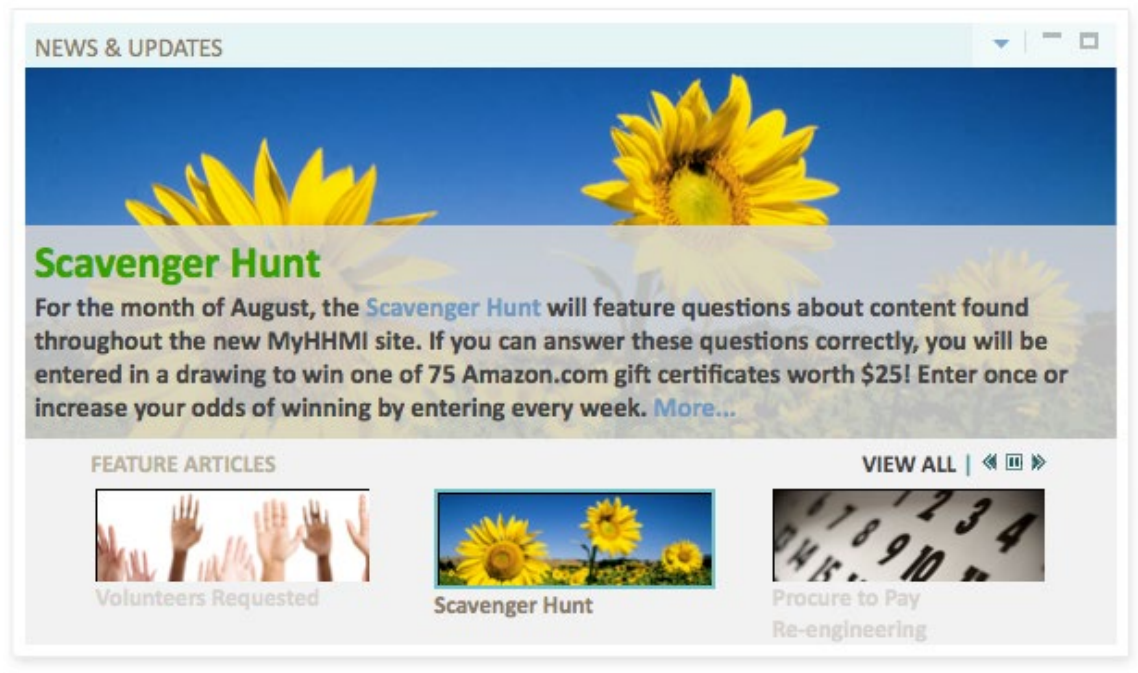


Pictured: The *I Need To...* menu was key to helping users find important content on the new site when it first launched.

The team also considered ways to encourage users to explore the new design. Users don’t tend to browse an intranet, even if it’s new and improved. They want to find the information they need and get on with their jobs. Because of this, users typically know only the features and content that they use regularly or that someone else mentions to them. They rarely stumble upon new content or tools they could use. In

usability studies, we often hear users exclaim how useful a page of information or a tool on the site is, only to then complain that they never knew it was there.

There are several approaches that teams can use to gently persuade users to explore the site beyond their typical stomping grounds. One simple, yet potentially effective approach is to do a scavenger hunt on the site, offering prizes as an enticement for participants. HHMI's intranet team held such a hunt, offering the possibility of winning a \$25 Amazon gift certificate in exchange for users answering questions about information found throughout the site.



Pictured: A scavenger hunt encouraged users to explore the new site, introducing employees to new content areas.

Small touches as well as structural details throughout the site show the thought that went into the redesign. The search-as-you-type feature gives users quick access to results. Customizable pages let users see what they want. A focus on the user's own homepage, department, and project pages makes the site not just a reference resource, but also a work tool. Lists of recent pages viewed or recent employee searches give users information based on specific behavior on the site. The end result of the team's hard work shows their emphasis on users' needs—behavioral, intellectual, and emotional.

BACKGROUND

HHMI's first static intranet was built in 1993 and has gone through a number of relaunches, most of them focusing on design changes. The early site suffered from lack of use and outdated and often incorrect content. "It [the first intranet] was not heavily used, and most of the content updates were done in the IT department even though users could take training and update it themselves," says Leslie Forte, Director, Web Applications. "As IT is not always the first to know everything, the content was often outdated and incorrect."

In 2007, some of the company's VPs decided that a more modern site was needed to stay current with technology, enable collaboration, and provide a single access point to all HHMI network resources. At that point, the company reached out to a portal design firm, TandemSeven, to build the new portal. The resulting site was a giant leap forward for the company. "We went from a static and outdated site to a modern, clean, dynamic, and personalized site," says Forte.

INTRANET TEAM

The HHMI internal team is quite small. In fact, there's only one full-time person whose primary responsibility is the portal. A number of other developers and administrators provide assistance to the portal on an as-needed basis.



Pictured: (Top row, left to right) in-House HHMI Team Members: Leslie Forte, Alycia Eck, Kris Weinhold, Kate Forte, Dave Tabor, Bill Dorris; (middle row, left to right) TandemSeven Design Team: Frank Donofrio, Paul Eisen, Kenneth McDowell, Carrie Notte, Andrew Schechterman; (bottom row, left to right) Technology Team: Steve Wyman (TandemSeven), Alessandro Barroso, (TandemSeven), Ron DiFrango (CapTech Ventures- not pictured), Scott Duncan (CapTech Ventures), Niran Fajemisin (TandemSeven - not pictured), Phil Kedy (CapTech Ventures), Mundi Morgado (TandemSeven), Vincent Schoenfelder (CapTech Ventures).

Ownership

HHMI is learning what many large companies learn about intranet ownership: Although the project is often an IT initiative, IT isn't the department best suited to either own the intranet or be responsible for its content and communication needs.

At HHMI, the portal is currently owned by IT, but a search is underway to hire a new communications staff member who will share ownership of the site with IT and keep the site's focus on communication.

"We have not historically had anyone focused on internal communications and the portal is a perfect match for that," says Forte. "Having it owned solely by IT has not worked for us in the past and we are hoping this new arrangement will provide more timely content updates for the site."

Working with Agencies

Right from the start of the redesign project, HHMI planned to engage an outside firm. The internal team partnered with the TandemSeven team, which contributed to everything from strategy to design. The visual design concept was provided by VSA Partners, who also designed HHMI's public website. TandemSeven brought in CapTech Ventures to assist the firm's technical team with development and implementation of *MyHHMI*.

Project management and oversight was handled by HHMI, while TandemSeven provided most of the design and implementation deliverables. HHMI IT staff members provided assistance with back-end server support and configuration. This partnership has been beneficial for the organization. "[Working with TandemSeven] provided us with a breadth of experience we would not have been able to provide on our own," says Forte.

The TandemSeven team executed on the following deliverables:

- Led creation of the vision and strategic roadmap
- Conducted user and stakeholder research to understand unmet needs, pain points, and opportunities
- Surveyed the existing technology environment, developed a vendor RFP, and defined technical requirements
- Created the information architecture, the interaction, and the visual design
- Designed, developed, integrated, and deployed the platform and supported applications

INTRANET TEAM RESPONSIBILITIES	
Role	Responsibilities
Portal Stakeholder Group	<ul style="list-style-type: none"> • Provides governance, program management, and other executive support • Responsible for the content and features available on group intranet level
IT/Communications Portal Team	<ul style="list-style-type: none"> • Promotion • Major content updates • Usability • Communications • Training and support of the content owners
Content Owners	<ul style="list-style-type: none"> • Responsible for the updates and consistency of their sections • Able to delegate some part of the updates or changes to other members of the team/department

TIMELINE

The timeline for the redesign project included the following milestones:

- **October 2007:** HHMI began the process of finding a consulting team
- **January 2008:** HHMI hired TandemSeven to do an initial requirements gathering to determine the feasibility of a portal
- **April 2008:** Work began on the project
- **July 2009:** Portal launch

Future Plans

We often talk to intranet teams just as their redesigned sites launch. At that point, they're often just beginning to think about what needs to happen next. The HHMI team is now grappling with many of the follow-up details that come quickly on the heels of project completion. "We are still working on our roadmap for the portal as it has only just been launched," says Forte. "We are currently using an outsourced solution for our HR-related content and applications as we could not build them all internally before this season's open enrollment period."

"The plan is to move all of our HR-related materials to the portal and build custom pages and applications in that framework," she says. This migration will take place over the next two years. Other short-term goals include adding more social and collaboration features to the site, such as wikis, a blog, and discussion forums.

GOALS AND CONSTRAINTS

The overarching goal for the portal was to develop a secure, single point of access to all departmental and enterprise-wide information, knowledge, policies, and applications.

Among the specific goals were to give employees:

- A common interface for all content housed by various systems, providing employees with self-service access via single sign-on

- Real-time access to data and applications
- Secure project areas to increase engagement and foster collaboration among teams within the organization

Constraints

Budget is always an issue with intranet projects, especially for nonprofit organizations. But the HHMI project had a time constraint on top of the ever-present budget restrictions. “We had a firm deadline to get the portal launched a few months before our benefits open-enrollment period,” says Forte. “We were changing out benefits packages and all 3,000 employees were now going to be doing their benefits elections online for the first time.”

Because employees had to access the benefits application via the portal, the company wanted all employees to be familiar with the site and able to log in before open enrollment began.

USERS

Universal access for all employees was one of the design goals of the HHMI portal and a wide variety of users in a broad range of situations use the portal and its features. “The portal’s ultimate goal was that it serve any employee of HHMI, at any location—at home in the evening or over the weekend, at the HHMI home office, regional and administrative offices, government and private organizations, universities, and scientific settings, such as laboratories,” says Andrew Schechterman, Principal User Experience Architect, TandemSeven. “Even ‘pre-employees’ (in the stages of ramping up) and students are given some access to the portal, facilitating a smooth and effective transition to their roles/jobs.”

Supporting a Wide Variety of Users

HHMI users include executives; nonprofit business, organizational, finance, and legal professionals; scientists; and a full range of clinical management, executive, and frontline administrative support staff. A sampling of roles (and rights) include staff from the following areas: Records and Archives, Conference Services, Grants, Travel (domestic and international), IT, Business Systems, Legal Counsel, Education, Supplies, Food Services, Labs Management, Science, Executives, HR, and so on.

The major user groups for the site include: headquarters personnel (contract, hourly, salary, and emeritus), personnel located in regional offices throughout the US (primarily mid- to upper-level administrative), and scientists and their clinical and administrative teams, also located throughout the US.

The following five main groups use the intranet:

- **HHMI scientists and lab and administrative staff** who design and conduct research, administer and manage labs and staff, engage in lab procedures, make presentations, and publish research
- **HHMI Institute employees** including executives, directors, managers, administration, and other staff members who provide leadership, direction, management, and comprehensive support for all employees and the general public

- **Vendors, collaborative institutes, and organizations** who do business with HHMI; in future releases, these groups will have limited access (likely to the project workspaces)
- **Non-HHMI lab personnel** who might work in a lab with one of the organization's investigators, but who don't work directly for HHMI

USER TASKS

Supporting a Wide Variety of Tasks

How and why people use the HHMI portal varies almost as widely as the types of users. Most of the site's users provide the day-to-day support for scientists engaged in research efforts. "Many users rely heavily on tools provided within *MyHHMI*, such as those that structure, guide, or scaffold complex searches for different types and formats of information, searches for and the creation of employee groups (for communication, research and planning, volunteer and committee membership), for the creation and management of within-department and across-Institute projects, for rich collaborative calendars and group planning tools, tasks, and alerts, and for shared documents," says Schechterman.

Some of the site's users turn to the portal for specific, vertical purposes such as data management and analysis. Some users engage with the portal for broad purposes, such as managing employee benefits or vendors and supplies, including tracking requests, requisitions, and fulfillments. And finally, some users access the portal like a personal homepage, as a source of communication and information. Such users participate in groups and committees, learn about employee accomplishments (such as the HHMI investigator who received a Nobel Laureate), and let others know about the work underway in their department.

Common Tasks

Some of the most common tasks the intranet supports include:

- Accessing local and network software, applications, and tools
- Accessing the World Wide Web (seamlessly)
- Adding, deleting, and editing bookmarks
- Assigning rights, roles, and access to the intranet
- Bookmarking pages as favorites
- Creating, editing, archiving, and distributing content
- Creating, editing, managing, and subscribing to calendars
- Creating, populating, editing, managing, and archiving projects
- Customizing a homepage, including moving and editing portlets
- Emailing an individual or group from within selected applications
- Finding a document, form, or policy
- Finding and researching a department, lab, office, or location

- Finding and researching a person, their department, and their affiliations
- Getting online support (help) via a range of flexible resources
- Accomplishing frequent tasks (quickly) via pre-built shortcuts (such as *I Need to...*)
- Requesting limited or ongoing access to applications and content that might be secure or confidential
- Reviewing and making changes to personal benefits
- Searching, sorting, and refining search results via traditional and faceted options (for example, searching news stories, documents, persons)
- Viewing, creating, and saving (favorite) reports
- Viewing popular pages
- Viewing recently viewed pages and recent searches across a range of content
- Writing quick notes and to-dos

DESIGN AND USABILITY

Applying Multiple Methods

As stated previously, TandemSeven was hired to provide guidance in the strategy, vision, roadmap, design, and development of the new portal. The HHMI team felt it was important to apply a variety of methods of user engagement to inform decisions throughout the project. “HHMI was committed to TandemSeven’s experienced-centered approach; this was their commitment to their employees who delivered biomedical research as ‘products and services,’ addressing, for example, coteremporary human diseases such as cancer,” says Schechterman.

With that user-centric commitment in mind, the teams included many user research activities as part of the design process. These included:

Single Day Field Studies (Rapid Ethnography)

The teams used field studies to observe and learn from users who were outside of the immediate HHMI home office locations. Stakeholders concurred with the team’s opinion that there was only a modest understanding of how, for example, scientists, lab staff, and to some extent, even regional administrators and teams, were utilizing the current intranet tools and doing their jobs. Stakeholders wanted to better serve this “family of constituents” and recognized that there were likely many latent opportunities that were still fully unknown. The only way to reach these users was to go where they work and learn from them.

Users who were identified for these studies allowed the researchers to spend time with them in sessions lasting anywhere from a few hours to a full day so they could learn “in situ.” The team hoped to gain granular insights that are otherwise unseen or unknown.

Most volunteers were curious but unconvinced that these sessions mattered, until the researchers spent time with them. “At the end of the day, they were excited and sold,” says Schechterman. Though users were not provided diaries or disposable

cameras (or other survey instruments), team members did ask them to keep in touch. And many did, sharing insights as they occurred in the course of every day work over time. Some of these users even continued their relationship with the researchers by becoming part of subsequent usability studies.

This in-person research paid off for team members, who gleaned insights that would have never come to light without seeing the users in their native environments.

“One of the most revealing and perhaps sobering insights from field studies were that users were unaware of the existing tools available to them, had difficulty using or accessing the tools (such as multiple sign-on demands), could not use tools of systems in parallel reflecting their actual work, frequently and routinely made informal phone calls to HHMI home office staff to submit reports, make requests, obtain information, etc.,” says Schechterman. “Additionally, we uncovered and better understood the very human elements of the ‘us versus them’ culture that exists.

“Well known is that such tacit, often intangible human elements will trump even the best-intended designs and technologies,” he says.

Contextual Inquiries

The research team used a variety of contextual investigation methods, including iterative prototyping, informal user reviews, user surveys, use cases, screen flows and navigation model validation, and informal usability testing. To conduct this research, the team went out to their pool of users with tools in hand (clipboards, notebooks, cameras, and so on) to learn how users accomplished certain goals in context—at their desk, at their computer terminal, as they spoke with coworkers down the hall, or walked documents across the atrium to another office.

These contextual inquiries were focused on gathering the information necessary to map the requirements, flows, tasks, and goals (fulfilled or unfulfilled) that were identified as most critical for users to succeed based on their roles.

The study participants included stakeholders and subject matter experts who were also heavy users, and perhaps most important, users who were simply “end users”—that is, the many ground floor personnel who keep HHMI running smoothly. “These users offered remarkable insights into patterns of use, roadblocks, frustrations, opportunities, and workarounds, which could be properly designed for and integrated into the intranet over time,” says Schechterman.

As a next step, the team brought some planning and architecture documents (conceptual diagrams, visualized use cases and flows, screen designs, and wireframes) to these users (as well as to new users) and gathered feedback on those.

The research activities provided team members with valuable data that informed their thinking and helped them throughout the project at critical times, such as when selecting among alternative design approaches. The data also helped them correct their assumptions and misinterpretations.

Development of User Types

Early on, the HHMI and TandemSeven teams discovered a large range of distinct users (such as executive vice president, department manager, legal secretary, senior scientist, administrative assistant, and more). “We agreed to build user types to

capture the large breadth of cognitive, affective, and behavioral needs of these employees,” says Schechterman. “Our user types also informed, for example, roles and rights for single sign-on governance. Because we had significant complementary user data available to us, and had easy access to users on a regular basis, our user types proved valid and reliable design and technology benchmarks.”



- **Background** 12 years HHMI Southeast Region D, serving five OAS offices (TN, KY, NC, SC, GA), 400+ employees (including Scientists). Previously, one year at HQ, three years at Durham, NC OAS. Offers expertise in budget management, procurement, human resources.
- **Work environment** Primarily office, conference rooms, travels 1x/month within region, 1-2x/year to HQ.
- **Works closely with** OAS MAS. Supervises regional staff, immediate department (e.g., Purchasing Coordinator, Fiscal Manager, HR Manager, Administrative Assistants).
- **Usage patterns** On-going email, phone. 1-2x/day FedEx. Relies on PeopleSoft (all staff can view but not enter).
- **Triggers for action** and **Sample scenario of use** Purchasing issue where “an error can mushroom,” has debt/credit implications. Problem with an order fulfillment going directly to a Lab. Paper inbox and voice mails accumulate quickly if not always attended to. End of month, request, review regional data, produce summary report for HQ.
- **Needs** Easy access to ERM, benefits (“self-service paycheck”), inventories, debt schedules. When producing monthly regional summaries, sometimes needs drill down capability.
- **Wants** Centralized purchasing. Color coding of calendars/reports to flag critical data/changes. Start of day to-do lists including items needing approvals. Move from paper based to digital. Ability to produce custom reports. Easier ways to design, implement policies/procedures, ensuring consistent interpretation. Detailed reports of specific region activities.
- **Tasks, Goals, Motivations** High level on-boarding and off-boarding processes, security clearance processes/flows across systems. Provide leadership, training, vision, motivation. Establish standards and measurements. Quality control.

Pictured: An example of the user types the HHMI team developed during the site redesign process.

Collaborative Planning (CLASS) Sessions:

Because the HHMI team gathered data through so many channels, it was inevitable that the data analysis would be fairly complex, but team members applied the same rigor to the analysis that they applied to their research activities.

They arrived at a set of potential features and functions through a process that began with developing requirements matrices and rankings and culminated in a series of collaborative planning (CLASS) sessions where the team worked with stakeholders to both convey the findings and guide the group to consensus. The CLASS sessions included guided PowerPoint presentations, colored Post-It Notes on posters and walls, and white boarding. During these sessions, stakeholders discussed, weighed pros/cons, and ultimately prioritized sometimes hundreds of variables and opportunities.

“As the stakeholders had already been exposed to some (but not all) of the user research, they were able to consider user needs along with business goals and technical parameters,” says Schechterman.

Although it was a balancing act on the part of all parties, the planning sessions and ranking surveys paid off. Informal usability testing revealed that the team's collective efforts were largely on target.

"Applying multiple methods helped us be better informed where a user might be inadvertently denied access to something routinely or occasionally needed, or where a user might be afforded unnecessary access to a part of the system that would cause undue burden on both the user and the system," says Schechterman. "As such, one thing we were able to inform (and design for) was governance—a complex but overarching set of rules, assumptions, practices, and audit trails that were defined by feature and function matrices, rankings, and collaborative discussions."

Involving Stakeholders

The TandemSeven team worked hard to involve stakeholders throughout the design process to keep a steady flow of feedback coming into the project as it progressed through the design and development stages. This contributed to the project success on many levels.

"We first interviewed stakeholders at HHMI headquarters," says Schechterman. "Next, extensive and ongoing user research was conducted with a full range of employees, as well as within science labs with staff and investigators, to understand unmet user needs and connect them to business goals."

The team also surveyed the existing technology environment, developed a vendor RFP, and defined technical requirements. "After analyzing the findings," he says. "We created a vision consisting of two scenarios to illustrate the experience of the portal from a user perspective and a future technical architecture to deliver it."

Team members solicited and obtained user feedback on a regular basis—sometimes weekly, sometimes bimonthly—and often informally, in the context of use. "Input was constructive, instructive, sometimes confirming, sometimes negating," says Schechterman. "Frequent adjustments were made, some subtle, some more overarching."

Using multiple perspectives, an iterative approach, and creative methods, the team helped crystallize the organization's needs and created an effective roadmap to deliver an enterprise portal that meets the company's goals of fostering collaboration and supporting content creation among the geographically dispersed employees.

Engaging Beta Testers

Prior to release of the new intranet, 150 beta testers were engaged for a two-month period in a controlled release of functionality. "Scripts for beta testers were written so that these users could deliberately exercise elements of the intranet's features and functions, also allowing them to more easily submit their feedback to the team. Hundreds of results were sent in," says Paul Eisen, Principal User Experience Architect, TandemSeven.

Overall, results of the beta testing revealed that users were excited about the portal and anxious for it to go live. Their enthusiasm was tempered somewhat by the reality that what they were seeing was a first iteration. During this period, the testers provided many suggestions for future enhancements and applications, and the team listened carefully to the feedback. "We reviewed all the feedback and added as many of the quick changes as we could in the time frame," says Eisen.

Expert Reviews

Although the team didn't usability test the existing site prior to the redesign, they did employ informal expert review sessions at the beginning of the project. "We also routinely returned to the current intranet to learn what was working and what was not and why," says Schechterman. "We used the information to provide expert opinion to HHMI.

Additionally, during the stakeholder interviews, contextual inquiries, and user interviews, the team learned which features and functions were effective, and which were problematic.

They also had a significant opportunity to collaborate with subject matter experts who provided a unique perspective on the intranet's usability from an advanced user role.

All of these interactions with users informed the choices the team made as the project progressed and gave them numerous data sources to rely on so that as questions or decisions arose, they could refer back to the users rather than relying solely on their own opinions or experience.

Success Factors

The HHMI team benefited from the depth of experience of many of the TandemSeven team members who have contributed to multiyear portal or intranet projects for other companies. Having intranet veterans on the team helps, but so does regular access to users.

"The team was also inspired by the scientists in the field we met with [and] their laboratory and support teams," says Schechterman. "Some of these teams provided us entry into their daily work lives that were in turn translated directly into the conceptual, tactical, strategic elements of the intranet."

Having repeated access to end users, many "just down the hall or just across campus" offered the team constant reminders, a steady stream of fresh eyes, and an appreciation of the tacit and small design opportunities that are often overlooked. Interfacing with end users also provided a healthy dose of reality as the project progressed.

Surprising Results

Schechterman cites a number of surprising (or larger than expected) results. Through the research, the team learned that users wanted:

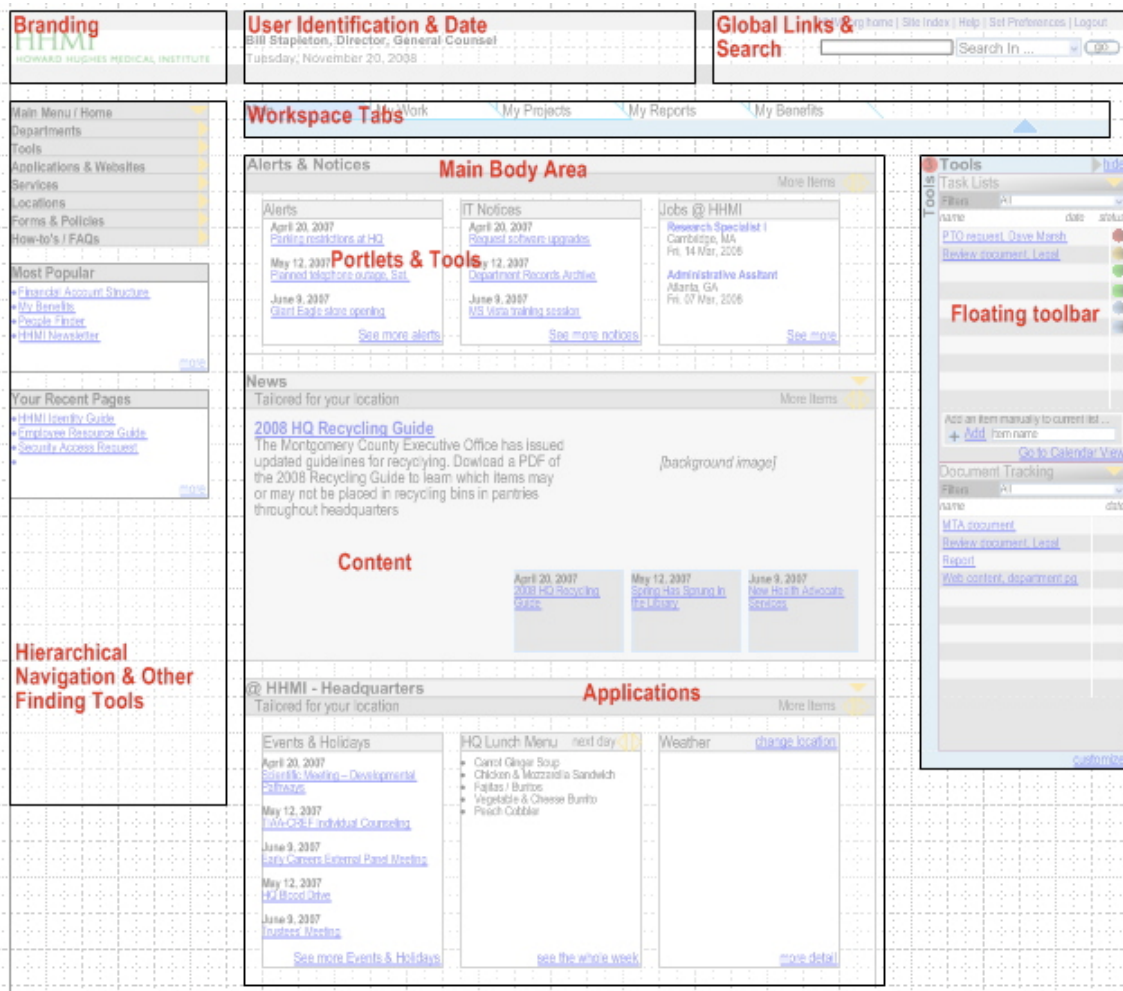
- Better/more community and communication among employees who were widely dispersed
- Tools that are easier to access and use on a daily basis (such as the ability to search for something very specific within multiple databases)
- More frequent updates (or access to) progress indicators, such as for events that users participate in or initiate
- Tighter integration of back-end resources, a personalized and highly customizable homepage, and the ability to easily modify content

Metrics

Throughout the project, team members obtained qualitative metrics, primarily via user reviews of architecture approaches, concepts, flows, screen layouts (see examples below), and interactions. Because they took both single measures (with a new user each time) and repeat measures (using the same users for some designs), Schechterman says the team was “able to better define failure, workarounds, and success.”

The team didn’t conduct formal usability studies. Nonetheless, Schechterman says “the team did see a diminishing number of problems with our designs over time, via ‘fail-first-fast’ contact with users. Sometimes on a daily basis.”

The first sets of quantitative metrics are being obtained as of this writing. With those in hand, the team will have the opportunity to learn more about the outcome of its design and development efforts and will be able to gauge both next steps and possible enhancements.



Pictured: An early IA sketch of a page from the intranet showing how the information areas will divide the page.

Project Phases

The HHMI portal project was broken out into two main phases: Vision, and Design, Architecture, and Build.

Phase I: Vision

A combined design and technology team conducted the Vision Phase, which lasted four months and included the following tasks:

- Stakeholder interviews (both design and technical)
- User research
- Requirements gathering
- Current state definition
- Future state vision of the portal and roadmap definition

Phase II: Design, Architecture, and Build

The Design, Architecture, and Build phase had the added complexity of integrating the design team's efforts with the development team consuming their output. This phase took roughly a year to complete and contained the following tasks:

Design

- Conduct contextual task analysis at headquarters and various field locations
- Align requirements for pilot and future releases
- Design information architecture for the overall portal framework
- Create visual design for the framework
- Run multiple integrations of design sets—including wireframe creation, development team reviews, gathering and incorporating user feedback, detailed design annotations, and visual design—before turning it over to development

Architecture

- Select the vendor
- Design the physical architecture
- Set up the development environment
- Build technical proof of concept

Build

- Build portal framework (iteratively)
- Conduct multiple Agile portlet and framework sprints including wireframe and visual design review, user interface development, services development, integration of UI and devices, testing, and deployment
- Set up production

- Beta test (with iterations), including: test specific functionality, fix issues, QA, and redeploy
- Deploy production

Usability Best Practices

After conducting user research, teams often learn valuable lessons about what works and doesn't work. HHMI team members describe a few of the usability best practices they learned along the way:

- **Maintain frequent, informal contact with users through quick iterative reviews.** "‘Low fidelity’ mock-ups, and participatory prototyping was essential to ‘moving the mountain one stone at a time.’ Frequently assessing the intellectual and emotional needs of the users and not just the behavioral needs accelerated our ability to co-create a cohesive product and service that was a usable (behavioral), useful (intellectual), and meaningful (emotional) intranet. This was particularly important as HHMI’s ‘product and service’ is the support and advancement of science—in part, to ameliorate human suffering and pain." (Schechterman)
- **Apply user-centered design.** "A user-centered and experience-centered design approach, with a fully delineated though flexible method and process, was fundamental to the success of the project. The freedom to dial-up and dial-down a particular phase allowed us to flexibly plan for and respond, rather than just engage in standard protocol. Two engagement leads (HHMI and TandemSeven) were critical to keeping a bird’s eye view on the many moving parts of the project." (Schechterman)
- **Keep technology and design teams integrated.** "Having an integrated design and technology team helped keep the designs grounded. This approach enabled us to take advantage of strengths and avoid some of the weaknesses of the various technologies used to develop the portal. It is always critical to design not only with the end users in mind, but also the technologies that will implement the designs." (Stephen Wyman, Vice President and Project Manager, TandemSeven)

URL AND ACCESS

The site’s URL is: <https://my.hhmi.org/>. Though many users make the portal their start page, they are not required to do so. Remote users account for most of the user population. They connect via a Juniper Networks SSL VPN.

TECHNOLOGY

The portal is built on JBoss Portal running on Red Hat Enterprise Linux, and content is stored in Alfresco running on the same. Java code for portlets, servlets, and so on is developed in Eclipse, and code is version controlled using an SVN repository. Bug tracking is handled using Mantis. Web content stored in Alfresco has versioning, so a change history is kept for each document.

Choosing the Technology Platform

The TandemSeven technology team facilitated a full vendor selection process for HHMI. JBoss was selected for its robust architecture, and because it offered a

lightweight, easy to maintain platform. "There were several areas in which we had to enhance the platform," says Vincent Schoenfelder, Solution Architect, CapTech Ventures. "And, because JBoss is open source, we were able to directly extend the product."

The enhancements included:

- **Decentralized governance.** JBoss allows for a single administrator to maintain the portal; the custom extensions allow for decentralized administration. Department administrators can be limited to administer only their portal sections. This includes custom page creation, assignment of portlets to pages, and security administration.
- **Microsoft Exchange integration.** The custom extensions take advantage of the Exchange Web Services, providing email and calendaring information directly on the portal. The custom calendar portlets let users display multiple calendars in a single calendar view.
- **In-place editing and workflow.** This product enhancement lets content editors directly edit content from within the portal. Content changes can be made live immediately, or sent to another user for review. Options allow for reviewers to view current and draft content.

Also, the team extended the portal platform to support the interaction design. "In order to support the interaction design, our portlets had to utilize AJAX to make partial updates to the page," says Phil Kedy, Lead Technical Architect, CapTech Ventures. "We extended a well-known framework called 'Spring Portlet MVC' to be able to handle AJAX functionality (Portlet 2.0 specification)." With these types of custom extensions, the technical architecture was able to support the interaction design.

Visual Design Tools

The interactive design was created using MS Visio. Once the initial framework was agreed upon, the team designed tabs with corresponding portlets using annotated wireframes, also in MS Visio. All design documents were stored in a SharePoint folder with final documents being moved into an approved folder. TandemSeven, in conjunction with the HHMI team designed and developed the visual design in Photoshop. The combined TandemSeven, CapTech Ventures, and HHMI technical teams took the Photoshop files and annotated wireframes and coded them in HTML, JavaScript, and CSS so that they could be integrated with the portal environment.

Collaboration is Key

Many technology platforms have limitations when it comes to optimizing the user interface. Companies often choose a platform because it delivers the functionality they require, while knowing that there will be trade-offs when it comes time to customize the UI. This means that tight collaboration must exist between the design and development teams to ensure that the UI doesn't take a back seat to the functionality. The HHMI team knew that this collaboration would make the difference between good customization and bowing to the technology constraints.

"A primary take-away from this effort would be to place a high degree of emphasis on a tight collaboration between the visual designers, user experience architects, and technical resources as early in the process as possible," says Niranjana Fajemisin,

Principal Technical Architect, TandemSeven. "This provides some boundaries around the final visual design output and vastly reduces the challenges of integrating the visual design into the portal infrastructure."

JBoss Portal, the portal product deployed for the HHMI intranet, provides a rich set of APIs to facilitate development of a strong visual design. Team members therefore developed a design theme to facilitate a consistent look and feel across the portal. Creating that theme required some compromise, however, as they had to strike a balance between keeping the original visual design and branding, and contending with the performance requirements and technical limitations inherent in HTML browser rendering capabilities. "An extensive amount of cross-browser testing was required to balance the compartmentalized nature of portlet development with varying levels of support provided in each version of targeted browsers," says Fajemisin.

SEARCH

The HHMI site uses Google Search Appliance (GSA) and instead of a "crawl" approach, it takes advantage of GSA's ability to accept pushed content. In the crawling process, a search engine methodically and routinely gathers site information. Pushing allows for manual control, letting administrators send data to the search engine and include more details that can support a more robust governance model, faceted searching, and other more advanced features.

"Although GSA is very good at crawling sites, enterprise portals introduce complexity [related] to role-based security and governance models. The basic crawl functionality isn't adequate for these purposes. In order to meet the business requirements, we developed custom feeds (pushing of information) that included metadata to support these business objectives," says Schoenfelder. "GSA provides a robust API that allowed us to push content into the search appliance while enforcing our governance model."

"Our push-based feed approach affords us sufficient control over what results get returned by searches to meet HHMI's business requirements," says Ron DiFrango, Technical Architect, CapTech Ventures. The site search utilizes GSA's robust APIs, and the team installed a search architecture to provide a gateway that could service all portal search capabilities. Searches ranging from documents and Web content to people data are presented in various formats to meet the high user expectations for search results. In addition to extending the search, GSA allows users to effectively limit search results as well, enabling them to find information much more quickly.

HHMI.org PeopleFinder Help Logout

MYHHMI

Welcome, Steve Wyman | Wednesday, August 26, 2009

DEPARTMENTS LOCATIONS DOCUMENTS APPLICATIONS I NEED TO...

MY HOME MY PROJECTS

Home > Search Results

Search using the choices below:

SEARCH FOR

compliance Go

DEPARTMENT

- ☒ All departments
- ☒ Accounts Payable
- ☒ Application Security
- ☒ Archives
- ☒ Banking Office
- ☒ Budget Office
- ☒ Business Systems Support
- ☒ Communications
- ☒ Facilities
- ☒ Finance
- ☒ General Accounting
- ☒ General Counsel
- ☒ Grants
- ☒ HHMI institute wide
- ☒ Help Desk
- ☒ Human Resources
- ☒ Information Technology
- ☒ Internal Audit
- ☒ Investment
- ☒ Library
- ☒ Meeting Services
- ☒ Office of the President
- ☒ Payroll
- ☒ Purchasing
- ☒ Records
- ☒ Science
- ☒ Tax Compliance
- ☒ Travel

Go

FORMAT

- ☒ All formats
- ☒ Web Content
- ☒ PDF
- ☒ Microsoft Word
- ☒ Microsoft Excel
- ☒ Powerpoint

Go

SEARCH RESULTS

Narrow your search using the choices on the left

Looking for Benefits and Payroll related information? Also search MyHHMI Benefits.

Viewing 1 to 5 of 11 people found in PeopleFinder. [VIEW ALL MATCHES IN PEOPLEFINDER](#)

Name	Site or OAS Location	Phone	Email
Janelia Farm Research Campus	Janelia Farm Research Campus		
Janelia Farm Research Campus	Janelia Farm Research Campus		
Controller		301/215-8888	
Janelia Farm Research Campus	Janelia Farm Research Campus		
Janelia Farm Research Campus	Janelia Farm Research Campus		

We found about 182 results for the term **compliance**. [Powered by Google](#)

Viewing 1 to 25 of about 182 documents and pages

« PREVIOUS 1 2 3 4 5 6 7 8 NEXT »

Foreign Nationals [Web Content]
... for tax purposes cannot be processed until a completed and signed IRS Form W-9 or HHMI W-9 Substitute form has been submitted to the Tax Compliance Office. ...

Glossary of Terms for Tax Compliance [Web Content]
... GLACIER Online Tax Compliance System This web-based system of information has been implemented by HHMI to help foreign national employees determine their ...

1099s [Web Content]
... be treated as a corporation for tax purposes. For more information please contact Grant F. DeMeritte in Tax Compliance at x8542.

Relocation [Web Content]
... For more information see the following policies: Human Resources - Relocation/Moving Expense Reimbursement; Administrative - Travel; Tax Compliance - Relocation

Overview [Web Content]
Tax Compliance is responsible for the oversight and management of all property, income, sales and use tax returns including the 1099 reporting process and the ...

Tax Compliance Relocation Policy [Web Content]
Tax Compliance Relocation Policy. General Description. ... The Travel Office will maintain a separate file for each employee's relocation. 4. Tax Compliance Manager. ...

Popular Forms [Web Content]
IRS Form W-9 (substitute); IRS Form W-9; IRS Form 8233; IRS Form 8843; IRS Form 1099; IRS Form W-7.

Sales and Use Tax Rates [Web Content]
Sales and Use Tax Rates. The following is an update of the list of states where the Institute is taxable along with their applicable tax rates. State, Rate. ...

Tax Procedures [Web Content]
1099 Tracking and Reporting; 1042-S Tracking and Reporting; Annual Report; Disaster Recovery Plan.

Pictured: The *Search Results* page provides text-string and facet-choices and is structured like the *Documents Catalog* to let users narrow and adjust their searches.

MOBILE

The site's technical architecture wasn't optimized for mobile devices, but the site is accessible to users on mobile platforms that support browsers, such as iPhone or BlackBerry devices.

CONTENT MANAGEMENT

CMS Technology

Content for the HHMI portal is stored in Alfresco 3.1, a third-party open-source product that TandemSeven recommended after conducting a requirements gathering and analysis effort. The Java-based Alfresco software uses a combination of a relational database and a file system with Lucine indexes to store content items. Alfresco exposes much of its functionality to clients via a RESTful services API.

Web content is stored using Alfresco's Web Content Management, while documents such as spreadsheets, PDFs, presentations, and Word documents are stored using Alfresco's Document Management.

Content Ownership: A Mixed Model

Many companies commit to either centralized content management or a decentralized model. HHMI's approach is more of a mixed model with some departments managing their own content and others working through a central content manager. Because the governance plan for *MyHHMI* is flexible, both approaches work simultaneously and successfully.

Content is displayed on *MyHHMI* via portlet windows. "Portlet windows are instances of portlets, where each instance has its own security rules," says Scott Duncan, Content Manager, CapTech Ventures. "For example, portlet windows on the *Human Resources* page are created using a Human Resources content portlet instance." People who manage content for their departments are placed in LDAP groups that have administration permissions on the appropriate portlet instances.

"This gives them access to *MyHHMI*'s inline editing feature," he says. "The inline editing feature allows a user to edit content from within a portlet window."

The *MyHHMI* content manager has the necessary access to edit content for any portlet instance, such as for any department or group.

Administration and content management are integrated right into the portal interface. "This allows creation and editing of pages and content directly from the portal," says Eisen, adding that the alternative would be to use "the very cumbersome UIs" provided by JBoss and Alfresco.

Instead, the approach the team chose offers "a huge benefit to the organization," he says. "The simplified editing process and mechanics will lead to increased frequency of content publishing, which increases the vitality and relevance of the portal, encouraging more user engagement."

Editing Workflow

Scott Duncan explains the workflow for editorial approvals on the site: "For document management content, there is no workflow," he says. "For Web content, the workflow model is loose.

"An author may choose reviewers from the corporate directory and invite them to comment on content before the author approves it," says Duncan. "The author may approve the content for publication at any time, and may even opt to not allow for any review at all."

The following screens illustrate a typical content-editing sequence:

The Accounts Payable department is responsible for the timely and accurate processing of invoices in order to pay vendors and reimburse employees in accordance with established policies. They are also responsible for preparing and distributing checks; all disbursements are based on authorizations from the appropriate delegated authority and within established internal control procedures.

Take a Video Tour of AP

Spend some time with Alva and the rest of the Accounts Payable Department; see what happens "All in a Day's Work." To play the video, press the > (play) button on the control panel in the RealPlayer plug-in shown below.

If you currently have RealPlayer installed on your PC, the video will start immediately. If you do not have Real Player, either call or [e-mail](#) the Help Desk.

Pictured: Editing step 1: In this example, there's content in a portlet ready to be edited.

The screenshot shows a content editor interface. On the left, there is a text area containing the same text as the previous block: "The Accounts Payable department is responsible for the timely and accurate processing of invoices in order to pay vendors and reimburse employees in accordance with established policies. They are also responsible for preparing and distributing checks; all disbursements are based on authorizations from the appropriate delegated authority and within established internal control procedures." Below this text is a section header "Take a Video Tour of AP" followed by a paragraph: "Spend some time with Alva and the rest of the Accounts Payable Department; see what happens 'All in a Day's Work.' To play the video, press the > (play) button on the control panel in the RealPlayer plug-in shown below." Below that is another paragraph: "If you currently have RealPlayer installed on your PC, the video will start immediately. If you do not have Real Player, either call or [e-mail](#) the Help Desk." On the right side of the screenshot, there is a dropdown menu with a yellow header "ADMIN SETTINGS". The menu is open, showing four options: "Change settings for everyone...", "Change appearance for everyone...", "Edit this content", and "View your draft".

Pictured: Editing step 2: A user with admin rights selects *Edit this content* from the dropdown menu. Note, if the user doesn't have admin rights, the choice isn't visible.

New content is being drafted.
Location: /Departments/Accounts Payable/
File name: Overview.html

EditDiscard

The Accounts Payable department is responsible for the timely and accurate processing of invoices in order to pay vendors and reimburse employees in accordance with established policies. They are also responsible for preparing and distributing checks; all disbursements are based on authorizations from the appropriate delegated authority and within established internal control procedures.


Take a Video Tour of AP

Spend some time with the Accounts Payable Department; see what happens "All in a Day's Work." To play the video, press the > (play) button on the control panel in the RealPlayer plug-in shown below.

If you currently have RealPlayer installed on your PC, the video will start immediately. If you do not have Real Player, either call or [e-mail](#) the Help Desk.

Pictured: Editing step 6: Draft content is shown in the original portlet (no longer maximized).

New content is being drafted.
Location: /Departments/Accounts Payable/
File name: Overview.html

EditDiscardPublish
 Invite reviewers

The Accounts Payable department is responsible for the timely and accurate processing of invoices in order to pay vendors and reimburse employees in accordance with established policies. They are also responsible for preparing and distributing checks; all disbursements are based on authorizations from the appropriate delegated authority and within established internal control procedures.

Take a Video Tour of AP

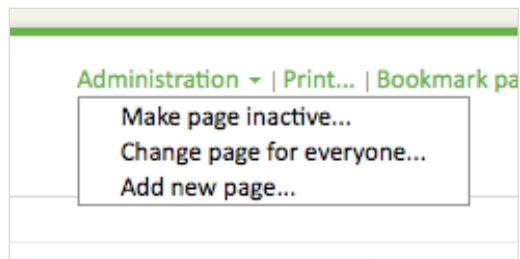
Spend some time with Alva and the rest of the Accounts Payable Department; see what happens "All in a Day's Work." To play the video, press the > (play) button on the control panel in the RealPlayer plug-in shown below.

If you currently have RealPlayer installed on your PC, the video will start immediately. If you do not have Real Player, either call or [e-mail](#) the Help Desk.

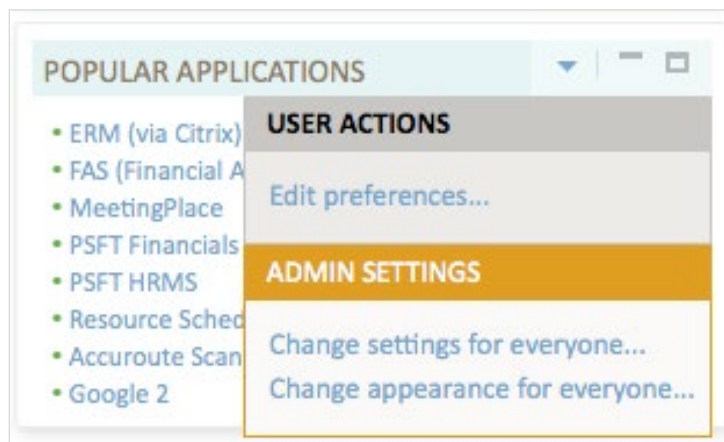
Pictured: Editing step 7: Users have additional options while content is in draft form. They can, for example, view the published content in place; continue to edit the draft; abandon the draft; or submit the draft for review.

Content Management: Administrative Functions

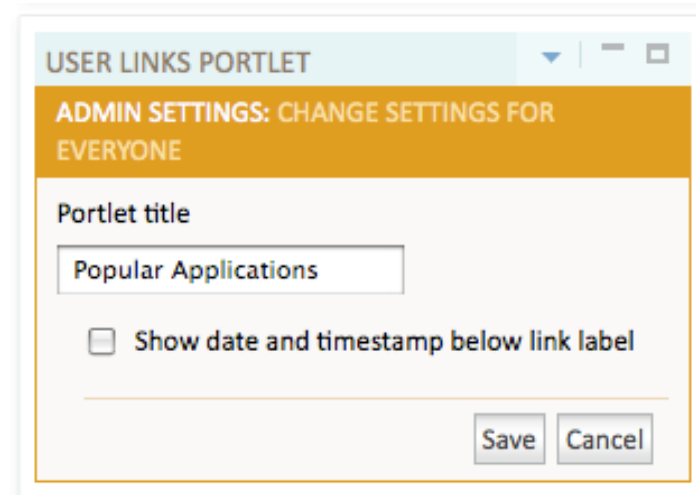
The screens below illustrate how some features of content management work on the site:



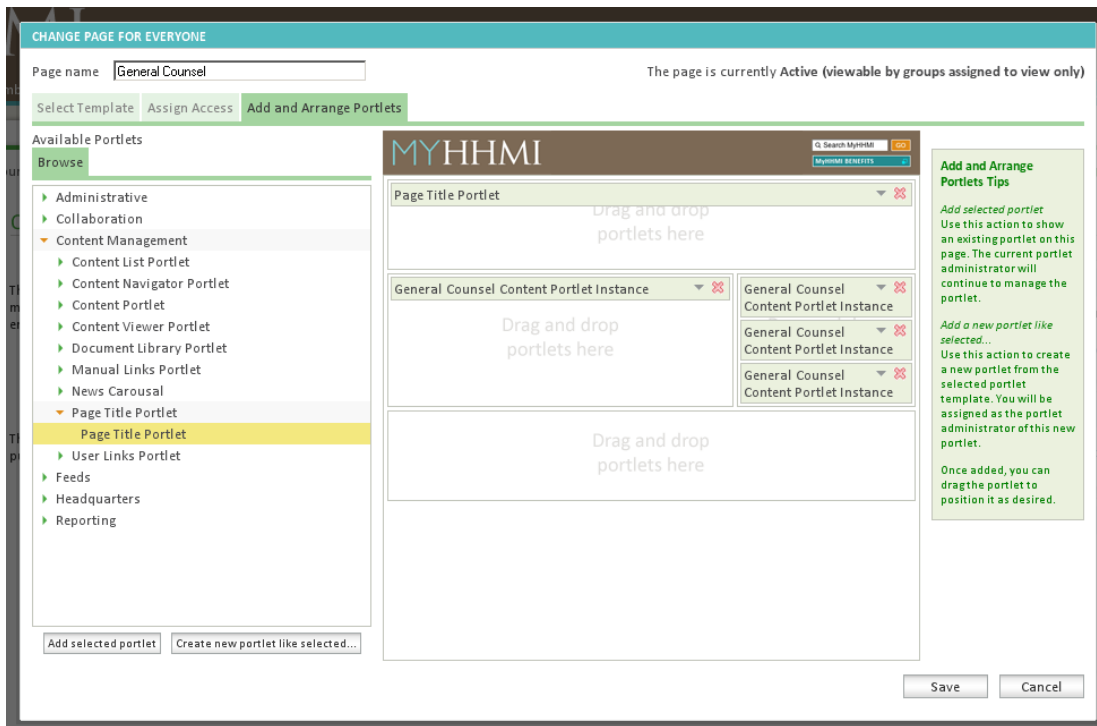
Pictured: For users with administrator access, a page-level menu contains the available *Administration* choices, including to set pages as inactive (invisible to others) until ready.



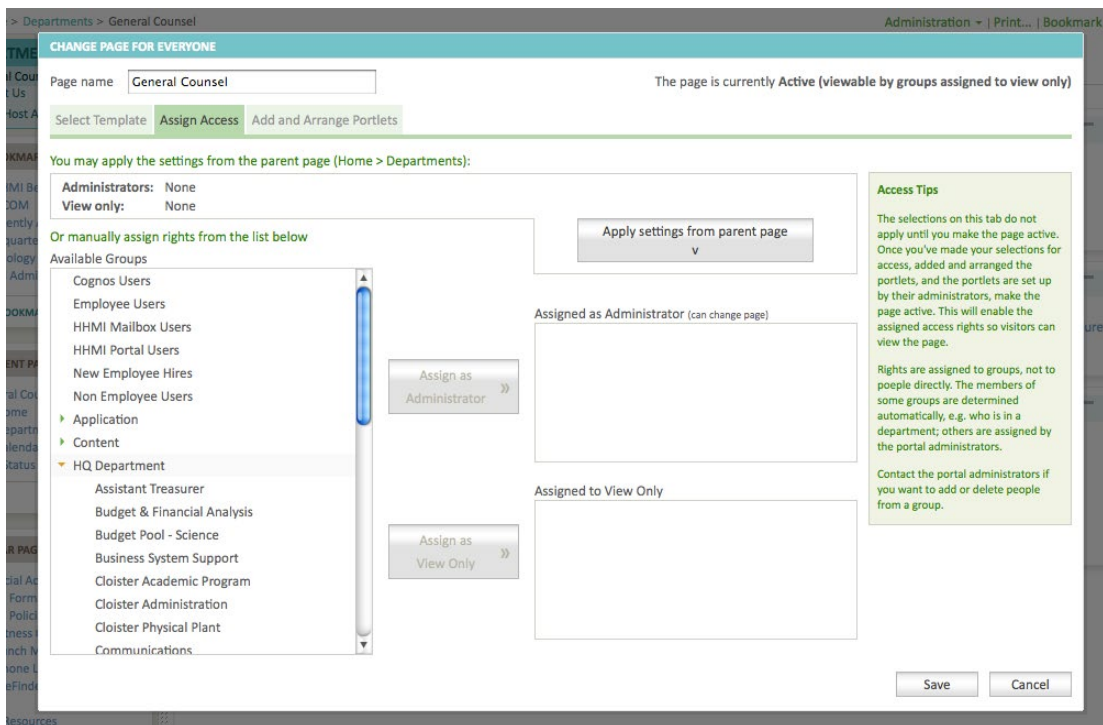
Pictured: The text "...for everyone" is commonly appended to administrative actions to reinforce the idea that the administrator's actions will be applied for all to see, as opposed to a customization of their personal experience. This distinction is also reinforced in the visual presentation of administrative settings (affecting all) versus personal settings, both in the portlet menu (shown here) and ensuing panels (shown below).



Pictured: The user preferences panel in the administrator's interface.



Pictured: Users can add portlets to the page and arrange the portlets through drag-and-drop functionality.



Pictured: Administrators can set the security for the page by identifying groups that can view or administer the page.

Working with Templates

Alfresco Web forms provide both authoring and rendering templates. “We have custom-defined Web forms using XSD schemas for the authoring templates (which Alfresco transforms into a content entry form) and XSL style sheets for rendering raw content (XML) into viewable mark-up (HTML),” says Duncan. “We created one Web form for each content type—for example, policies, newsletters, help items, and so on—in order to capture appropriate content data-specific for each type and to allow us the flexibility to simultaneously re-render all content of a given type as needed.”

Distribution of the templates is automatic. “There really is no way for Web content to be created for *MyHHMI* without using one of the templates,” says Duncan. “Whether an author creates content via Alfresco's Web client or through *MyHHMI*'s custom-built inline editing feature, they will be using one of the authoring templates.” There is a risk that authors might choose an inappropriate template when creating content (for example, they might create a *Help* item using the Policy template), resulting in content that is styled incorrectly. “But,” he says, “this kind of error should be caught by the workflow process.”

FEATURES

MyHHMI provides several interactive workspaces that are both personalized and customizable. These include:

My Home

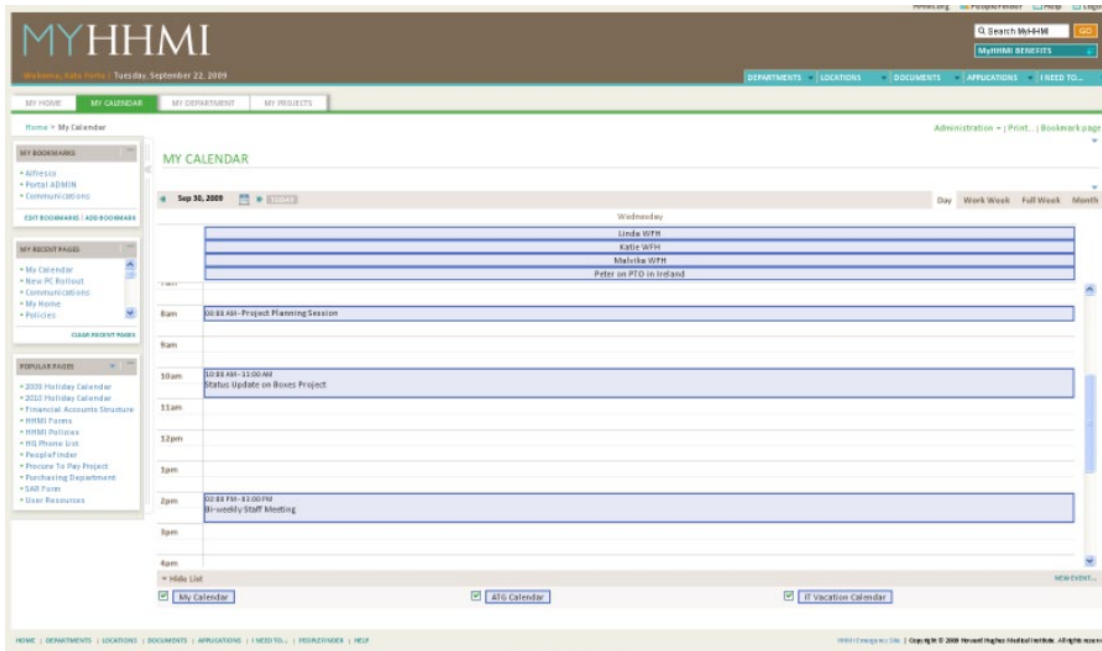
Every user has a homepage with the following characteristics:

- ***My Home is personalized*** based on users' location and employee status. For example, the initial content configuration is appropriate to their location at or outside of HHMI Headquarters. Also, new hires have links to on-boarding content that shows up on the homepage by default for two weeks after they begin work.
- ***My Home is customizable*** by using drag-and-drop interaction to place content portlets wherever users want on the grid. The content available for adding and removing includes any portlet that the user has access to anywhere in the portal, as well as Google gadgets. (Additional functionality that has been designed and will be implemented soon includes adding or removing content, and choosing an appropriate grid on which to lay the content.)

My Calendar

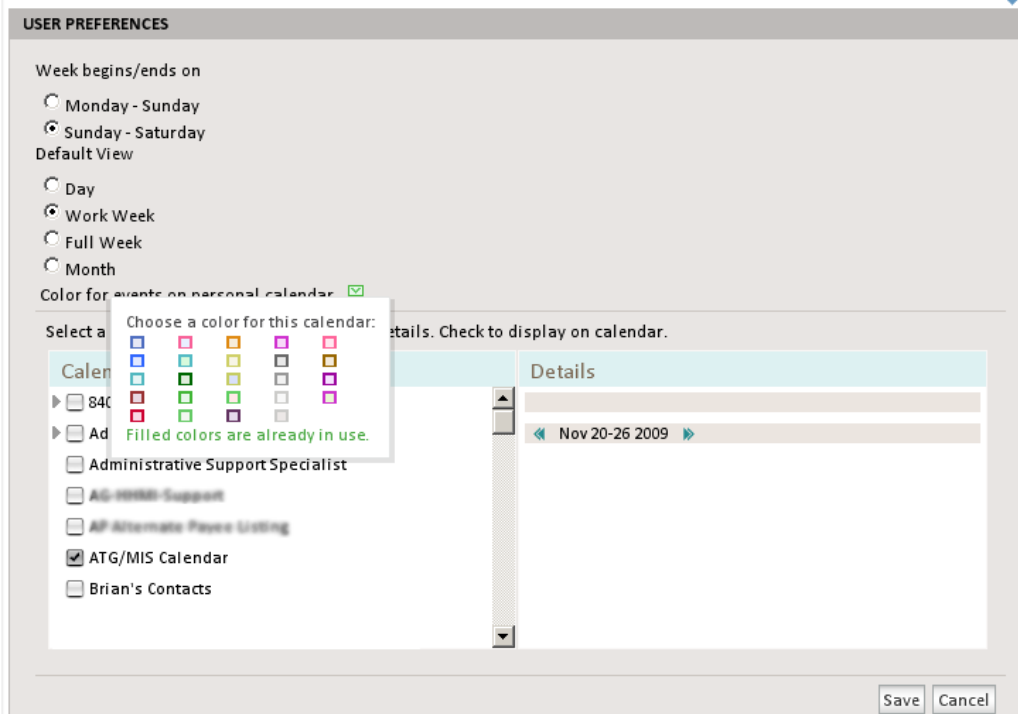
My Calendar is a custom tool that lets users overlay all of their calendars—including Microsoft Outlook, department, and project calendars—on a single grid. All calendars are housed in Microsoft Exchange and can be updated using traditional Exchange-supported clients.

Originally *My Calendar* was intended as a default portlet to be shown on the *My Home* page. However, performance issues in loading the data caused several seconds of delay in loading *My Home*, so a separate workspace was created just for the calendar. Users can still add this calendar to their homepage if they'd like, and now can also get a clean view of their calendar with a single click of the workspace tab.



Pictured: *My Calendar* is a custom tool allowing the overlay of the user's Microsoft Outlook calendar, department, project, and other calendars on a single grid.

MY CALENDAR



Pictured: The user preferences panel in the *My Calendar* tool lets users select the calendars to overlay and assign a color for each calendar's events.

ADD/EDIT EVENT

Calendar: New Steve Two

Subject:

☐ All Day

Time Zone: Eastern Standard Time

Start: August 25, 2009 8:00 AM

End: August 25, 2009 9:00 AM

Location:

Description:

Save Cancel

Pictured: Users can create events using the portal interface in the *My Calendar* tool. Although not as fully functional as the Microsoft Outlook edit features, tool gives users a convenient way to add events and populate the core fields from right inside the portal.

My Department

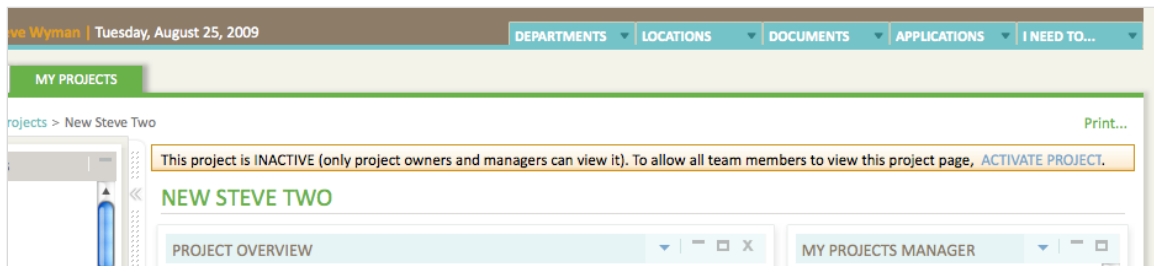
Each user is assigned a default department workspace, which is a secure space for collaboration and sharing content within departments and administrative offices. This is a logical place to house content that needs to be secured to department personnel. It provides an effective and highly function alternative to a shared LAN drive, which is typically what departments use today to service this need. The department or Office of Administrative Services (OAS) will assign one or more individuals to administer their workspace.

My Projects

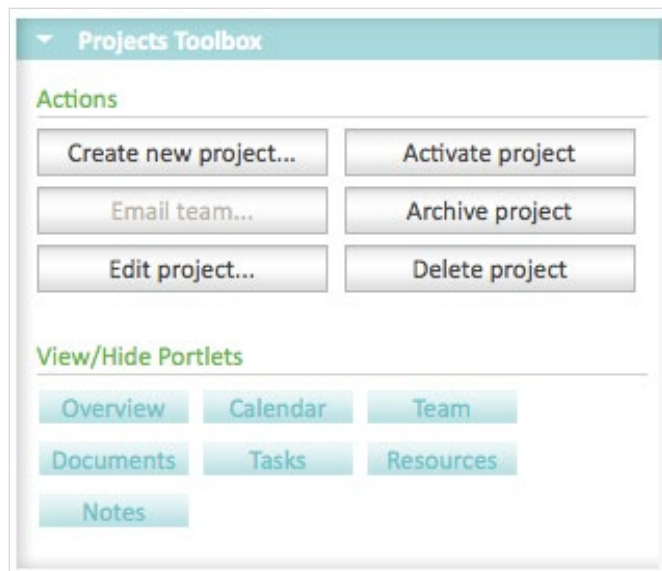
My Projects is a secure, highly configurable team collaboration space that lets users maintain notes, tasks, documents, events, and other resources.

Some of the user permissions in the *My Projects* area include:

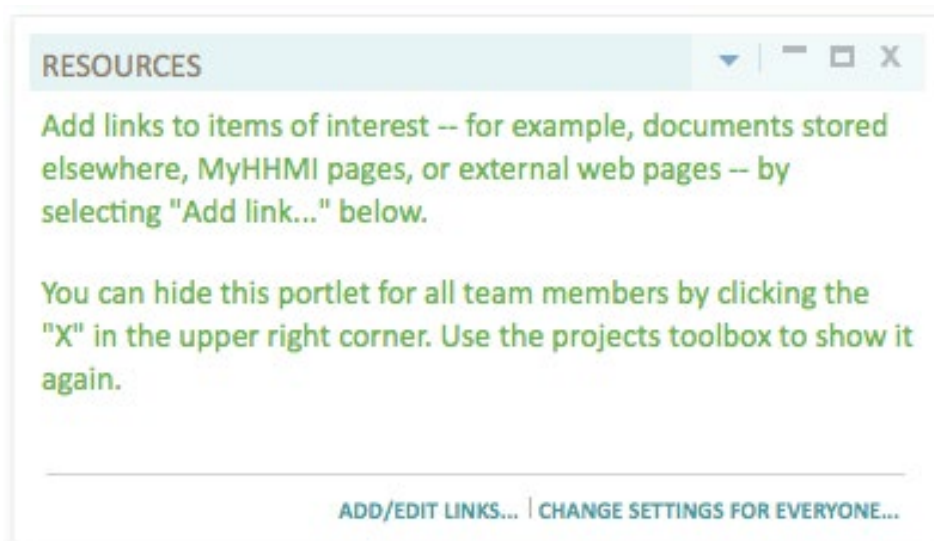
- All users have the power to create a project. When they do so, the full project page is created with all project assets (the available project portlets).
- The creator is automatically assigned as the project manager (PM), which gives them full authority to manage the project and its assets.
- The project page is initially inactive, which lets the PM set things up before exposing the page to other team members. Inactive pages are clearly marked at the top. The PM can easily toggle the project page between active and inactive using a button in the *Projects Toolbox*.
- PMs can archive projects using their *My Projects Manager*, an action that removes them from team members' views. Archived projects can be reloaded from *My Projects Manager*.
- PMs can hide any portlet using the toggle in the *Projects Toolbox*. If they choose to show that portlet later, it retains all of its content prior to being hidden.



Pictured: An inactive project page. The project page is initially set as inactive, which allows the PM to set things up before exposing the page to other team members. Inactive pages are clearly marked at the top.



Pictured: The *Projects Toolbox*. The PM can easily toggle the project page between active and inactive using a button in the *Projects Toolbox*.



Pictured: The initial state of each project portlet offers brief instruction on how to get started. This makes it very easy for novice users to set up projects without formal training.

Portlets

Portlets are powerful collaboration tools available on project pages. Following here are examples of some portlets in use on the HHMI intranet:

TEAM			
Name	Department/Location	Role	Phone/Email
DiFrango, Ron	Information Technology	Member	
Duncan, Scott	Information Technology	Member	
Eisen, Paul	Information Technology	Manager	
Fajemisin, Niran	Information Technology	Member	
Kedy, Philip	Information Technology	Member	

EDIT TEAM...

Pictured: The *Team* portlet shows who's on the project team.

TEAM

ADMIN SETTINGS: CHANGE SETTINGS FOR EVERYONE

First name

Last name

Department

All departments

Site or OAS Location

Brigham & Women's Hospital

Can't find someone? Use PeopleFinder

SEARCH FOR TEAM MEMBERS

PROJECT TEAM ASSIGNMENTS

Name	Phone/Email	Role
✕ DiFrango, Ron		Team member
✕ Duncan, Scott		Team member
✕ Eisen, Paul		Manager
✕ Fajemisin, Niran		Team member
✕ Kedy, Philip		Team member
✕ Schoenfelder, Vinnie		Team member
✕ Wyman, Steve		Team member

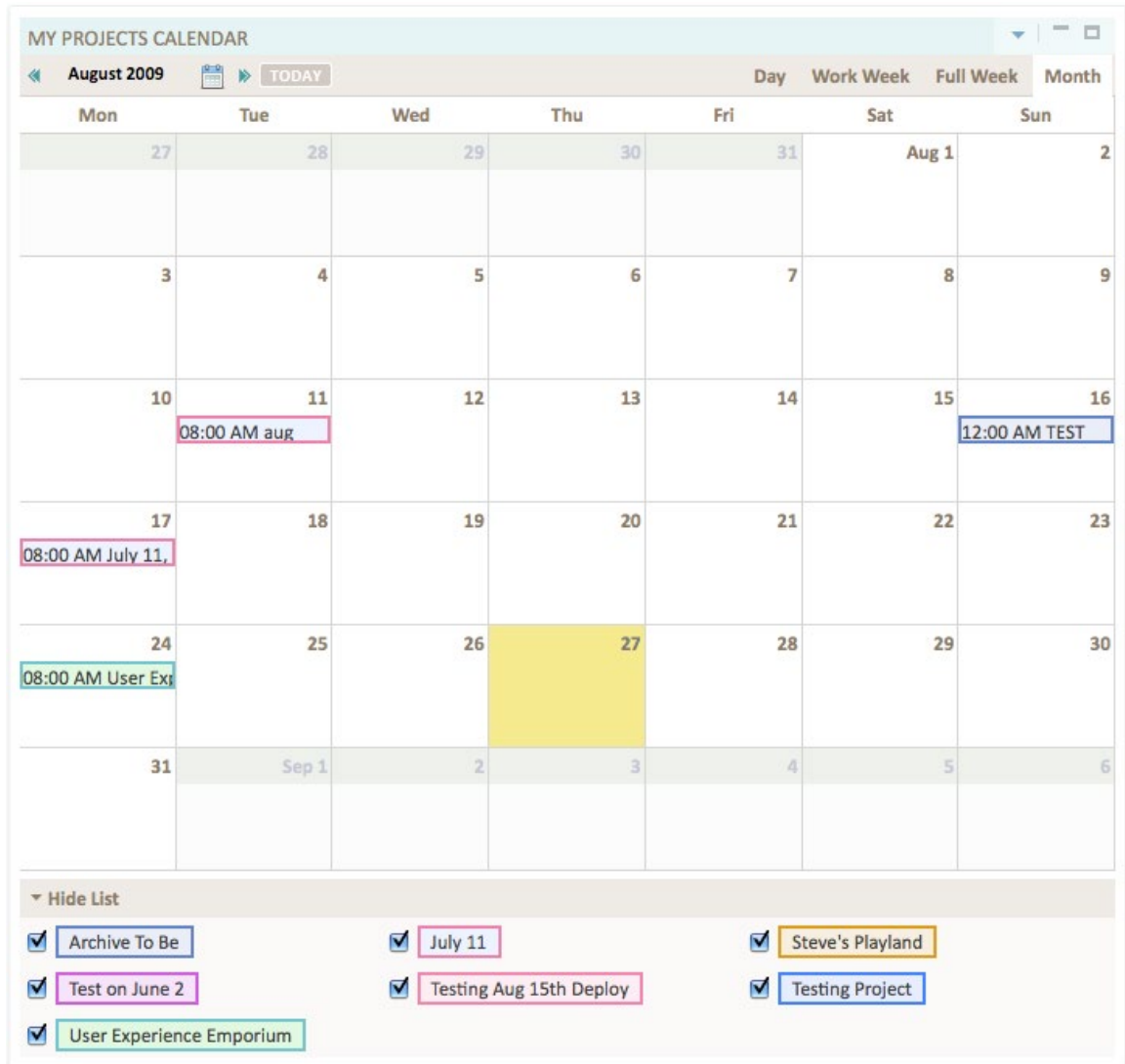
HAS RIGHTS TO

ROLE	View	Create	Edit	Delete	Archive
Manager	●	●	●	●	●
Team member	●	●	●	●	
View Only	●				

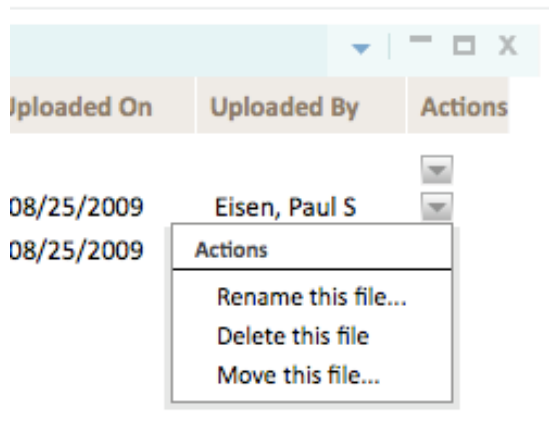
SAVE

CANCEL

Pictured: Using the *Team* portlet, PMs can assign anyone in the HHMI directory access to the project page, as another PM (full access), a team member (add/edit/delete access), or with view-only access. The meaning of these access levels is made explicit for PMs as they make the assignments. PMs can quickly add groups of employees, such as all of those in a specific location, without having to select each employee individually. Also, a single action (*Email team* in the *Projects Toolbox*), lets PMs generate an email to all team members.



Pictured: The calendar portlet lets PMs and team members create events. These events will appear on each user's aggregated projects calendar. Users can also show desired project calendars on their *My Calendar* workspace.

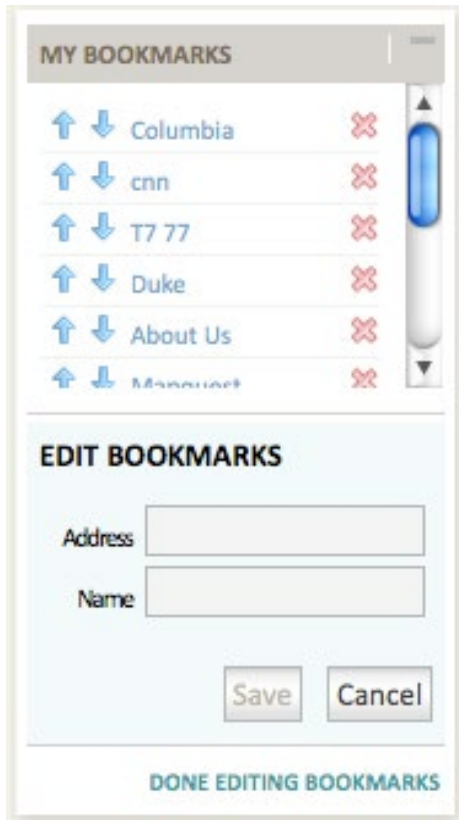


Pictured: Action menus are available to apply folder-level and file-level actions (shown here).

TASK					
<input type="checkbox"/> View tasks only assigned to me			<input checked="" type="checkbox"/> View open tasks <input checked="" type="checkbox"/> View completed tasks		
Status	Task	Created By	Assigned To	Start Date	Due Date
	Draft of assigned sections	Eisen, Paul S	Schoenfelder, Vinnie	Aug 25, 2009	Aug 28, 2009
	Draft of assigned sections	Eisen, Paul S	Eisen, Paul S	Aug 25, 2009	Aug 28, 2009
	Review consolidated doc	Eisen, Paul S	Schoenfelder, Vinnie	Aug 31, 2009	Sep 03, 2009
	Review consolidated doc	Eisen, Paul S	Eisen, Paul S	Aug 31, 2009	Sep 03, 2009
	Review consolidated doc	Eisen, Paul S	Wyman, Steve	Aug 31, 2009	Sep 03, 2009
	Review consolidated doc	Eisen, Paul S	Fajemisin, Niran	Aug 31, 2009	Sep 03, 2009

ADD NEW TASK | EXPORT...

Pictured: The tasks portlet allows users to assign and track project tasks.



Pictured: The bookmarks portlet, a permanent fixture in the left panel, can be edited directly by the user.

User-customizable links lists

These links lists let users set up links to *MyHHMI* pages, *MyHHMI* documents, or external websites. In the settings panel, intuitive controls are provided to sort or delete links.

In addition to the manually specified links lists described above, a query-based links list allows the user (typically a section administrator) to quickly show a list of links to items based on predefined criteria (such as all documents that are tagged as “Form” and published by “Accounts Payable”). This is a powerful tool for the content administrator, as it continually updates as the underlying content matching the query changes.

RESOURCES

ADMIN SETTINGS: CHANGE SETTINGS FOR EVERYONE

- General Counsel - About
- MTI Terms Checklist
- CNN

Add/Edit Links

Link successfully added.

Select item above to edit, or enter a new link

Location of Link

☒ MyHHMI page

☐ Documents Catalog

☐ External web page

Address

Label

DONE EDITING LINKS

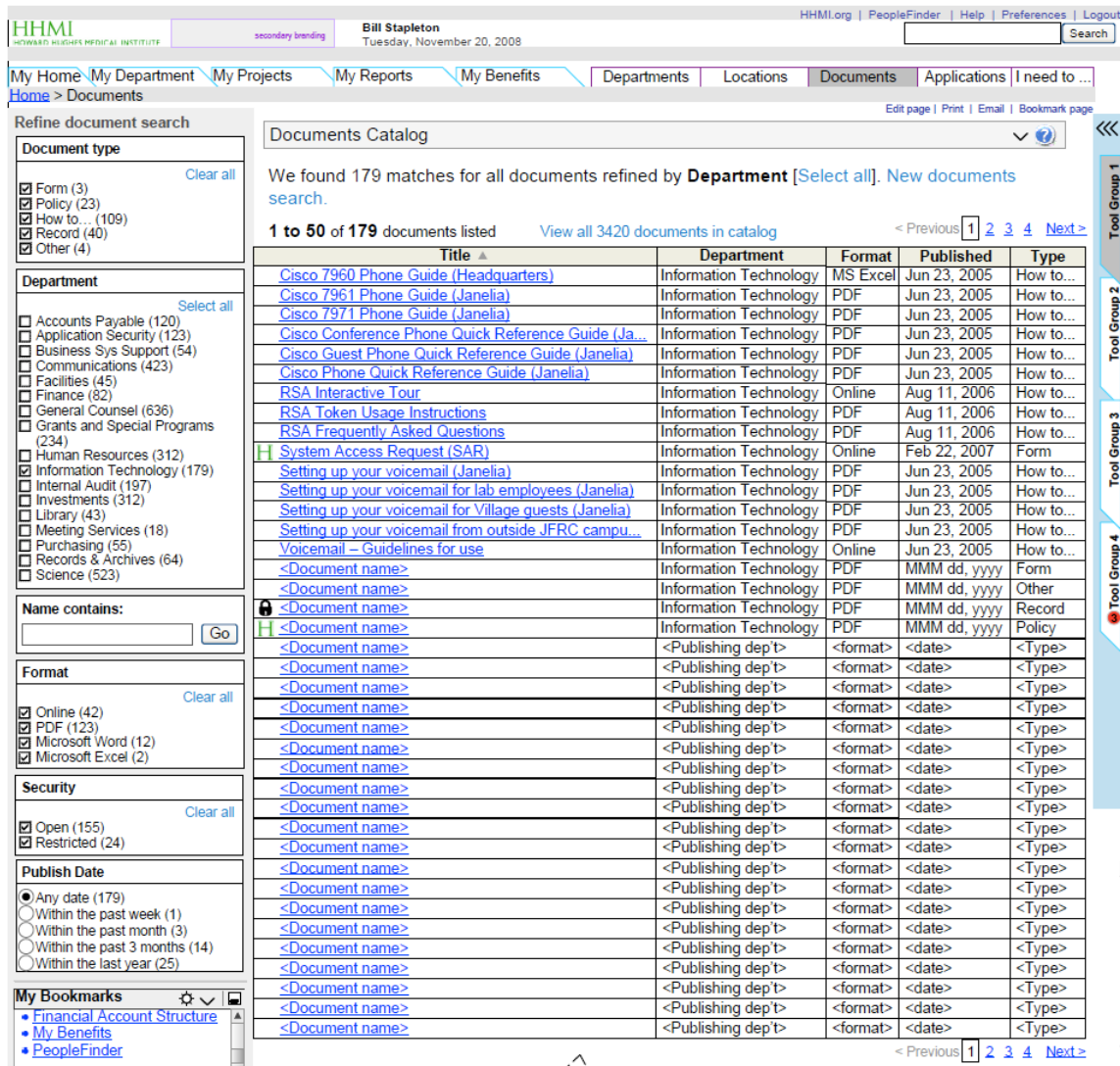
Pictured: The settings panel for the links list portlet that is available in all project pages. The same settings panel appears for similar link-list portlets available to section administrators and to end users who wish to customize a *My Applications* portlet.

Documents Catalog

This catalog is a repository of documents merging text-based and faceted search, as well as sorting. It allows users to search for documents based on keywords and on relevant criteria, such as the document type, issuing department, and publish date. The catalog conveniently aggregates all documents in the organization, while complementing the ability to link directly to specific documents from any page.

The catalog is very powerful in satisfying multiple search scenarios, such as:

- Finding a specific, known document
- Finding a document based on a general idea of what it contains
- Finding all forms published by HR
- Determining how many policies were published or updated in the past three months
- Sorting results by any desired column



Pictured: The *Documents Catalog* initial design. The interaction design for this feature required a bit of finessing to achieve user acceptance. During the initial design phase, team members tested six different approaches to the facets with end users. Test results showed that users preferred the solution that supported the selection of multiple values within each facet category.

Custom Workflow Status

The HHMI team built a custom application to view workflow status of legal contracts (Materials Transfer Agreements) of high importance to laboratories. According to Eisen, this is likely to prove a very compelling feature for users. It's expected that this particular functionality will draw traffic to *MyHHMI* from lab employees. This is important to the organization because historically many HHMI lab employees haven't felt much motivation to visit HHMI's intranet.

Easing User Transition

To ease the transition for employees accustomed to the former intranet, *MyHHMI* provides a task-based actions menu and other transitional support content, cross-linked to new content locations.

Employee Directory

HHMI's *People Finder* is a fully searchable employee directory, complete with user profiles. Some of its features include:

- Advanced search capability
- Functionality to display lists of employees based on site- and location-specific criteria
- Employee profile
- Recent searches portlet

The screenshot shows the 'HHMI PEOPLEFINDER' window. At the top, it says 'Search using Basic or Advanced' with a help icon. Below this are two tabs: 'BASIC SEARCH' and 'ADVANCED SEARCH', with the latter being selected. The main heading is 'PeopleFinder Advanced Search' followed by the instruction 'Complete one or more fields. Using multiple fields will narrow results.' The form contains several input fields: 'First name' (filled with 'Steve'), 'Last name' (filled with 'Wyman'), 'Email' (empty), 'Title' (empty), 'HQ Department' (dropdown menu showing 'All'), 'Site/OAS name' (dropdown menu showing 'All'), 'Site/OAS code' (dropdown menu showing 'All'), 'Department code' (text input field with a hint '(e.g., 0075-0001)'), and 'Region code and name' (dropdown menu showing 'All'). At the bottom right, there are 'Search' and 'Clear' buttons.

Pictured: The HHMI employee directory has advanced search capabilities.

Search

The site features a federated search facility that aggregates results from multiple data repositories, including the employee directory, documents repository, and all

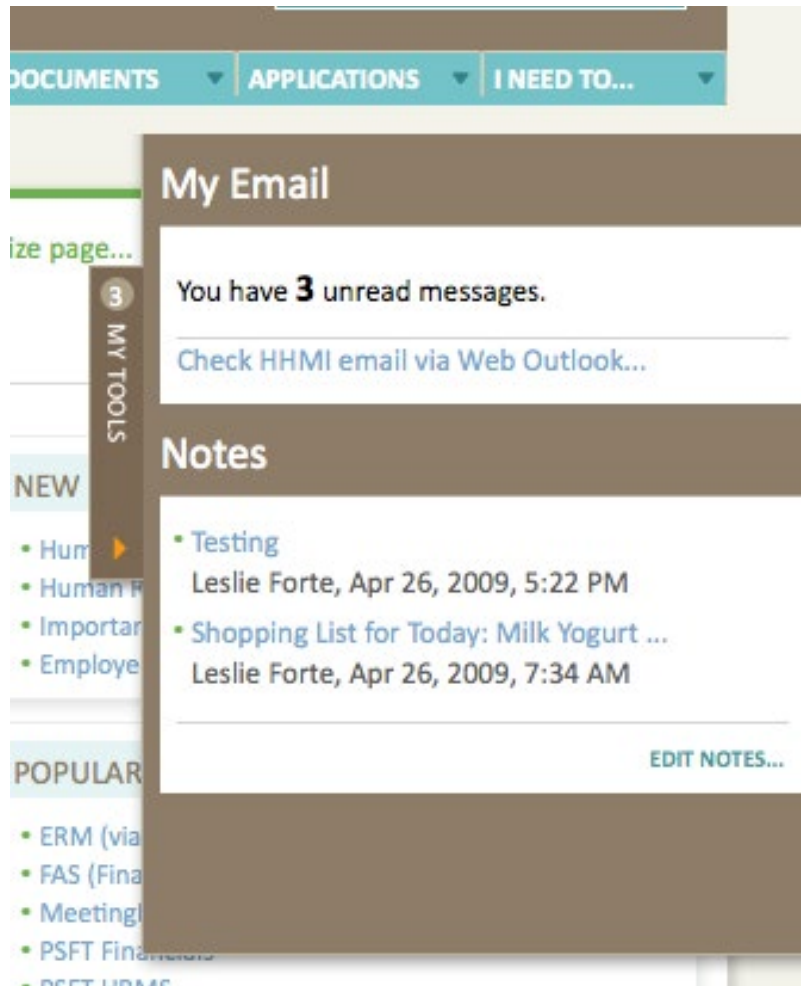
other content. It includes a quick-search panel of results as you type (inspired by the search facility at Apple.com).

Productivity Toolbar

This toolbar slides in from the right, and stays there as the user navigates. This leaves the tools always at users' fingertips, but easily moved out of the way. It features links to items such as email, notes, and tasks. Some features of this toolbar include:

- A tab that displays the number of items requiring the user's attention, so he or she can see it at a glance
- A portlet for email (at this point, it shows the number of unread messages and provides a link to Outlook Web Access for viewing them)
- A portlet for managing personal notes

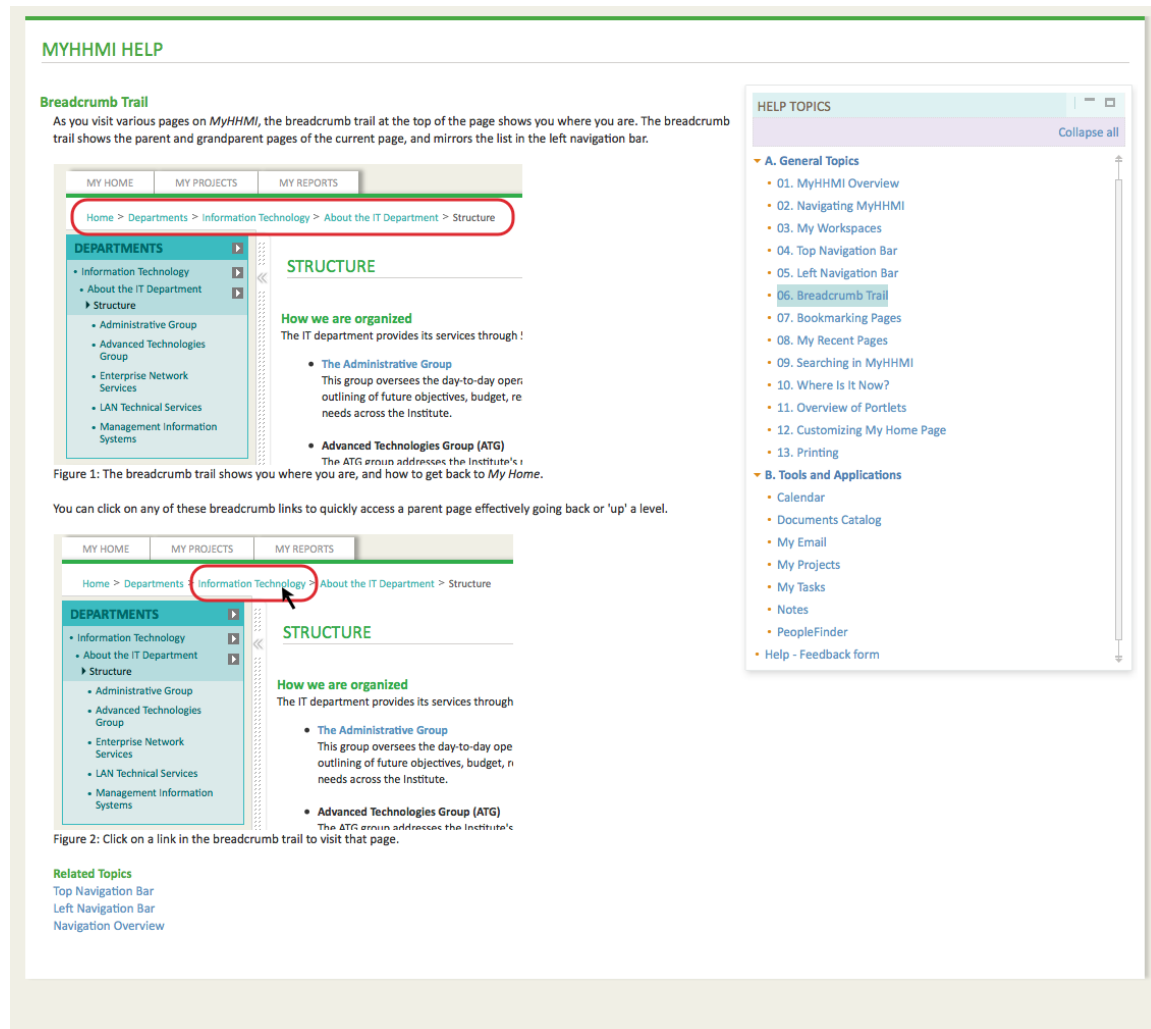
The toolbar design also supports multiple tabs to allow extension to multiple tool groups. For example, the team plans to integrate task managers for personal, content-management, and project tasks in a separate toolbar.



Pictured: The personal productivity toolbar on the HHMI intranet.

Help

An integrated *MyHHMI Help* facility supports novice users. It's accessible using the *Help* link in the utility bar, and also via *Help* icons throughout the portal, which navigate directly to the related *Help* content. Additional help is provided through the generous use of tooltips.



Pictured: An integrated *MyHHMI Help* facility supports novice users. It's accessible using the *Help* link in the utility bar, and also via *Help* icons throughout the portal, which navigate directly to the related *Help* content.

PERSONALIZATION AND CUSTOMIZATION

Portal Administration

The technical architecture supports the following personalization features:

- **Group-specific content.** Users can access content based on their participation in certain groups.

- **Team-specific content.** Users, through their membership in certain teams, can create, manage, and participate in team collaboration spaces (project or department), and specify who else can access the content.
- **Role-specific access.** The portal administrators can limit who views what, at either the page or the portlet level. For example, once an employee has worked for more than two weeks at HHMI, they no longer belong to a *New Hires* group, and therefore won't see on-boarding content on their homepage. Security can be further controlled at the content level via Alfresco. Security is managed implicitly for *My Department* or *My OAS* workspaces, and by the project manager through the *Team* portlet for projects.
- **Default content controls.** The initial view of a user's homepage is based on his or her location. This approach reinforces the portal's relevance to each employee.
- **Workspaces.** In addition to *My Home*, the content of all other workspaces is also personalized. For example:
 - **My Department/My OAS:** Users at Headquarters see the *My Department* page for their department; users located elsewhere see the appropriate *My OAS* page for their location.
 - **My Projects:** The user's *My Projects* workspace contains a list of only those projects to which they have access. This provides a highly personalized and relevant experience.
- **Notes.** The *Notes* tool contains only the user's personal notes.

Customization

Users can customize the site to their own specifications in the following ways:

- Customize their homepage by selecting a layout and adding, moving, or deleting content
- Create lists of employees based on specified criteria, such as all administrators in Janelia Farm Research Campus or all lab managers at HHMI's Yale labs
- View all personal and group event calendars on a single grid, displaying or hiding individual calendars as desired

RESULTS

Although the HHMI team doesn't engage in formal ROI measurement, as Eisen points out in the following examples, the redesign has resulted in improved functionality and user experience.

Users can now:

- Access and view documents (such as forms, procedures, and policies) and other content via a single search engine
- Access secured content that is restricted to particular groups
- Access other HHMI network resources from one single point of entry

- Create, manage, and participate in team collaboration spaces (project or department), which includes the ability to:
 - Specify who can access content
 - Upload and view documents
 - Assign and track project tasks
 - Add and edit project events
 - Specify links to resources
 - Communicate with team members
- Customize their own homepage (add, move, and delete content)
- Create and administer pages that house any available content
- Administer content directly in one place—rather than in a separate, clumsy administrative interface—using a custom design based on user-centered principles and established best practices in design patterns
- Create lists of employees based on specified criteria, such as all administrators in a particular location
- View all of their event calendars on a single grid
- Experience a consistent, coherently branded singular system for accessing all content across the organization

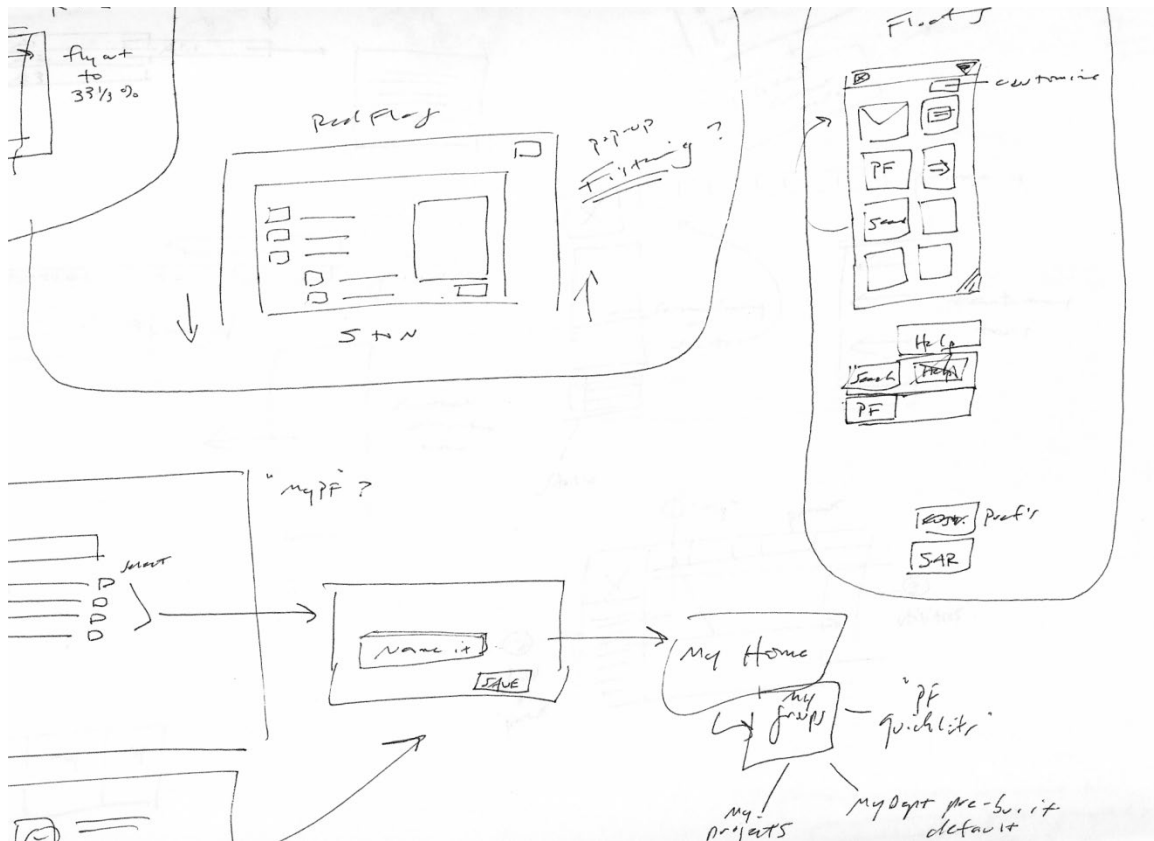
LESSONS LEARNED

HHMI team members share some of their lessons learned:

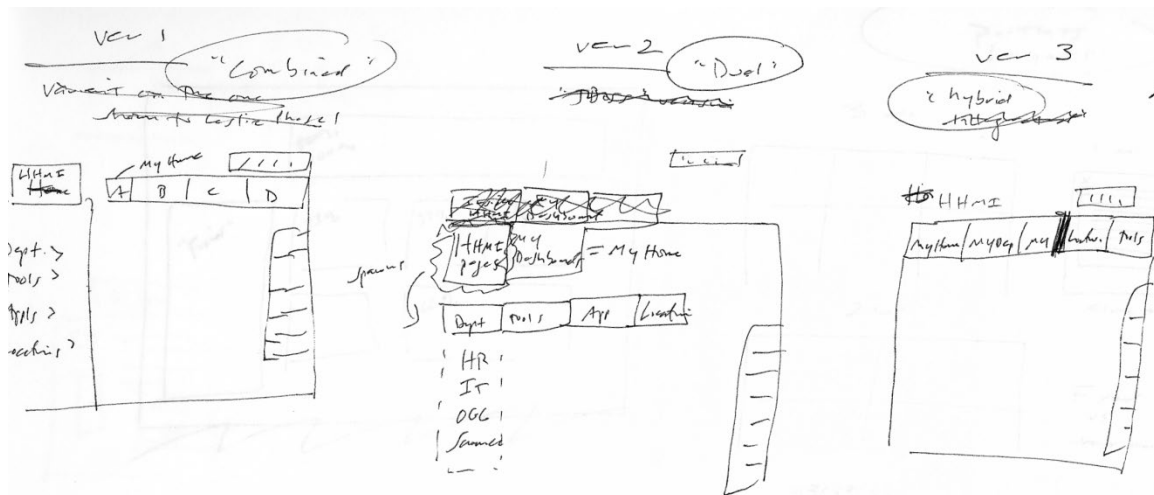
- **Design and technology must be tightly wed.** “Cater the interaction design to the strengths of the technology platform. This will maximize the capability and performance of the solution. For example, the interaction designers initially sketched out a wizard solution to support the creation of projects. However, all of the scaffolding for the wizard would have had to be custom coded, which would have taken significant resources (human and server) from the core functionality being supported. A better solution was suggested by the technical architects to capitalize on the portal framework by auto-generating all portlets for a new project in a default state. This was eventually implemented and now all the user does initially is assign a name to the project, and optionally select start and end dates. To support the user learning how to populate each content area on the project page, tips are provided at the portlet level.” (Eisen)
- **Build a multidisciplinary core team.** “This is an old lesson, but one that bears repeating often: The integration of business, technology, and design resources into a single team will increase the creativity of the final design, and increase the likelihood that the design will get implemented as anticipated.” (Eisen)
- **Don’t underestimate the complexity of content migration.** It would be wise to cite the effort level involved in restructuring and migrating content at the lower level from an existing CMS to a new one, as this isn’t a purely technical task and usually requires substantial manual labor and judgments. (Kenneth McDowell, Principal User Experience Architect)

- **Plan for it.** “We knew from the start that the organization of content, defining/tagging the content, assigning authors and approvers, designing a governance model, and content migration would be time consuming. With content management, it is typically the non-technical items that take the most time. We addressed this early and dedicated a resource to this effort.” (Schoenfelder)
- **“Go slow to go fast” works.** “The project sponsor encouraged and afforded the team to take the time to sketch early, learn from users, think, collaborate, iterate, and integrate. Various times in the project, the client recognized the critical and long-term value in ‘going slow to go fast,’ and that design isn’t production. Because of this, as the project progressed, there were times when many elements—seemingly disconnected from each other—elegantly coalesced due to the prior effort at design-planning and the time the team took to contemplate, white board, and experiment a bit. This lack of ‘rush to market’ and ‘throw on the wall and see if it sticks,’ was critical to an outstanding final design, still sensitive and responsive to timelines, deadlines, and cost. The opportunity to ‘go slow to go fast,’ seemingly contradictory to contemporary software development (and sometimes design) methods and processes, resulted in deliverables and integrated products that unfolded gradually and effectively, rarely requiring significant rethinking or rework, making our usability, information architecture, and interaction design studies (and related activities) much more perfunctory and confirming... a surprising, fresh, and underutilized approach that resulted in no major usability surprises. (Schechterman)

The screens that follow show the team’s early design sketches:



Pictured: An example of an early sketch.



Pictured: Another example of an early sketch.

- **Allow plenty of time for cross-browser testing.** "Because of the very interactive nature of this project, support and adequate testing of supported browsers were critical to a timely release. From a usability standpoint, Safari and Firefox significantly outperformed IE7 and significant effort was spent getting IE6 working." (Wyman)

- **When content editing is easy, users will be eager to contribute.**
“We were surprised by how many people were so eager to have the ability to edit their own content. Our old intranet was so static and even though we encouraged our users to get some training and edit their own content, very few of them took advantage of that option. So, we figured they were not interested in updating their own content. When we launched the portal, we didn’t make user content editing a top priority on rollout. But we soon learned that users were chomping at the bit to add their own pieces to the site. For the old intranet, they were a bit daunted by having to ‘know HTML’ or understand Web publishing. Now they don’t, and that fact alone makes contributing content much more approachable and less intimidating. Also, the portal allows others [not just site editors] to contribute content in other ways.” (Forte)

Habitat for Humanity International (HFHI) (2011)

Using the intranet/extranet:

Habitat For Humanity International (HFHI) is a non-profit, non-denominational Christian housing ministry. Habitat welcomes all people, regardless of race, religion, ethnicity, or any other difference, to build simple, decent, affordable houses with those who lack adequate shelter.

Habitat employs over 800 people worldwide and serves over 2,000 affiliates in more than 80 countries.

Headquarters: Habitat For Humanity International is headquartered in Americus, Georgia

Number of employees the intranet/extranet supports: More than 800 staff worldwide and currently over 25,000 registered users of affiliated organizations (which include affiliates, national offices, state support organizations, ReStores, Campus Chapters, and more)

Company locations: Habitat operates in nearly 90 countries

Locations where people use the intranet: Users accessing the intranet and extranet are located throughout the world

Annual Sales: N/A

Design team: My.Habitat 2.0 was developed via collaboration between the Communications, IT, and Organizational Learning Divisions of HFHI and AW Systems, Inc., a technology consultancy based in New York City

Members:

HFHI Staff: Drew Hancock, Senior Webmaster; Bob Norris, Master Librarian; Lisa Reitz, Senior Director Learning and Knowledge Systems; Jane Lee, Interactive Web Designer

AW Systems: Allan Wellenstein, President and Chief Information Architect; Doug Green, Senior Account Manager; Brian Jenkins and Seth Lopez, Technical Leads; Greg Bautier, User Interface Design

SUMMARY

Combining an intranet and extranet into a single, comprehensive knowledge source, the Habitat for Humanity International (HFHI) intranet team faced and overcame many common intranet demons. Goals for the redesign included making content easier to find without having to know who owns the content, establishing content ownership to avoid duplication and inconsistency, ensuring the site addressed needs of groups both in the US and around the world, and making the site the authoritative information resource.

The team overhauled the publishing structure to ensure high-quality content that is easy to locate and displayed according to users' regions and language options. The site has a variety of audiences, from HFHI's 800 employees in five regional offices and field offices around the world, to the staff and volunteers of affiliated organizations, including affiliates, state support organizations, national offices, ReStores, Campus Chapters, and more, accounting for 25,000 registered users.

The newly designed site, My.Habitat (MH) 2.0, is a single location where users can access and share knowledge, resources, and tools. Officially in beta until January 2011, the site includes a link to the previous version to ease users' transition to the new design.

A core improvement to the site is targeted content. The site's content is now targeted to users based on regional area and language, which users can set for themselves. Users thus see only content that pertains to them, and international audiences are no longer flooded with US-centric information.

The new site combines the old intranet and extranet into one. This solves the problem of duplicate content across the sites. All content that pertains only to employees appears within the *InSite* tab, which is visible only to employees. *Employee News and Resources*, as well as employee-only upcoming events and discussion forum topics, also appear only for employees.

The homepage presents critical content. *News and Resources* are regionally relevant. Events, discussions, and forums keep users up-to-date and aware of what the organization is talking about and working on.

The screenshot shows the My.Habitat 2.0 homepage. At the top, there's a navigation bar with links: HOME, INSITE, KNOWLEDGE CENTER, FORUMS, STORE, and CALENDAR. A user profile for Allen Wellenstein is in the top right corner. The main content area is divided into several sections. On the left, there's a section for 'Employee News & Resources' featuring a link to the '2010 Health Benefits Plan document now available online'. Below this is a section for 'Featured: News & Resources' with links to 'Families Served Sample Press Release' and 'Gifts-In-Kind Catalog Accepting Orders!'. Further down is a section for 'Latest News / Resources' with links to 'Workplace Giving Pilot Program Monthly Newsletter - JUNE 2010' and 'U.S. Construction Definitions'. On the right side, there's a section for 'Upcoming Events' listing various seminars and meetings. Below that is a section for 'Employee Discussions' with links to various topics. At the bottom right is a section for 'Active Forums' with links to project titles and questions.

Pictured: The homepage provides news and resources for users, all targeted to the user's region.

Users manage preferences via a link at the top of each page of the site. The site currently supports English and Spanish content, but is configured to allow the addition of more languages as needed in the future.

Users can set their time zone and region, as well as selecting topics of interest. Employees can select *InSite* topics, which affects which employee events the user sees on the homepage and in the master calendar. All users can select *Knowledge*

Center topics, which affects the homepage's *Latest News and Resources* section. This allows users to see only the site updates that are most relevant to their own role and needs. Grayed out categories are those that users are required to keep. However, users will see content in those categories only if it's regionally relevant. All site content is tagged for regional relevance, so the site can direct the right content to the appropriate audience.

Habitat for Humanity®
My.Habitat 2.0 BETA

Allen Wellenstein (Logout | Admin)
Profile/Preferences | Region: US

HOME INSITE KNOWLEDGE CENTER FORUMS STORE CALENDAR Feedback | Help Search Go!

Welcome to My.Habitat 2.0 You are currently viewing My.Habitat 2.0 beta. [Return to My.Habitat 1.0](#)

Profile/Preferences

User Details

Account: HFHIAWellenstein

Name: Allen Wellenstein

Email: AWellenstein@habitat.org

Title: IT Support

Regional Settings

Time Zone: (GMT-05:00) Eastern Time (US & Canada)

Language: English

Region: United States

☐ Do NOT filter content based on my regional preferences in the tag browser.

Related FAQs

How do I change my MH2 password?

Affiliate Support: Where can I find out about the HFHI Organizational Development Program for Affiliates?

How do I change my Affiliate Information?

How do I edit my home page and other preferences?

In Site Topics

Selecting an InSite Topic will surface Upcoming Employee Events on the Home Page.

<input checked="" type="checkbox"/> Human Resources	<input type="checkbox"/> Employee Benefits	<input type="checkbox"/> Facilities
<input type="checkbox"/> Finance	<input type="checkbox"/> Governance & Compliance	<input type="checkbox"/> Information Technology
<input type="checkbox"/> Marketing + Communication	<input type="checkbox"/> Purchasing	<input checked="" type="checkbox"/> Travel

Knowledge Center Topics

This will populate your home page's "Latest News and Resources" section with content assigned to the topics you choose. Be sure to check back often, as more topics are being added all the time!

<input checked="" type="checkbox"/> US Office	<input type="checkbox"/> Advocacy	<input type="checkbox"/> Awareness Raising
<input type="checkbox"/> Capacity Building	<input type="checkbox"/> Community Development & Partnerships	<input type="checkbox"/> Construction
<input type="checkbox"/> Family Services	<input checked="" type="checkbox"/> Fundraising	<input type="checkbox"/> Disaster Response
<input type="checkbox"/> Human Resources	<input checked="" type="checkbox"/> Learning Resource	<input type="checkbox"/> Housing Finance
<input type="checkbox"/> Quality Assurance	<input type="checkbox"/> ReStore	<input type="checkbox"/> Legal
		<input type="checkbox"/> Volunteer Engagement

Save Cancel

Pictured: Users can set their own preferences to see only the content that is most relevant to them.

One of the most significant changes to the site is the way information is organized. Previously, all content was organized based on ownership of information, so users had to know who developed a piece of content in order to locate it. This led to some crucial content being hidden deep in the recesses of unfamiliar departments. This problem stemmed in part from an out-of-the-box SharePoint implementation.

The redesigned site organizes by content, rather than organizational structure. This is possible due to Habitat's agency, AW Systems (AWS), which developed a Content Slammer tool that separates content ownership and management from how that content is browsed by end users.

Now, users can browse by topic or content type. Options are displayed in mega-menu navigation. The mega-menu structure lets designers present topic and type options side by side. Each topic or type of content is accompanied by a number indicating the number of resources available to the user. All content on the site is tagged for these categories and types, with topic managers curating each topic.

Resource sites lead users to specialized tools available within the site's framework, such as *PhotoNet*, a photography database, and *Samples Database*, which offers templates and examples from worldwide affiliates.

The shift from an organization-based structure to a content-based structure has stretched beyond the intranet; it has also enabled cross-region collaboration on site content and resources.

HFHI is divided into five global regions, each with an office to support that region's affiliated organizations. In the past, each region maintained its own resources.

With MyHabitat 2.0, the team took the opportunity to consolidate information and combine resources across regions. The team created a *Communities of Practice* structure to bring together global teams of topic managers and site contributors to build global resources. The new site supports this cross-regional work, which has helped bring global consistency in the organization's thinking, a shift in culture, and unification of common program activities and strategies.

Habitat for Humanity
My.Habitat 2.0 BETA

Allen Wellenstein (Logout | Admin)
Profile/Preferences | Region: US

HOME INSITE **KNOWLEDGE CENTER** FORUMS STORE CALENDAR

Feedback | Help Search Go!

Explore by topic

- Volunteer Engagement (555)
- Operations & Governance (399)
- Fundraising (265)
- Construction (226)
- Advocacy (170)
- Awareness Raising (152)
- Family Services (101)
- Community Development and Partnerships (64)
- Housing Finance (54)
- Disaster Response (50)

Explore by type of content

- FAQ (295)
- Template (104)
- Checklist (34)
- Audio Recording (31)
- HFHI Policy (28)
- HFHI Legal Memo (10)
- Affiliate Operations Manual (AOM) (5)

Resource Sites

- Gifts in Kind Catalog**
A centralized catalog of donated goods with an online ordering mechanism and order management.
- PhotoNet**
A keyword-driven catalog of photos that represent Habitat's work around the world.
- Samples Database**
A database of Affiliate Samples in categories from marketing to HR to construction.

[Return to My.Habitat 1.0](#)

Events [Preferences](#)

- Employee Travel Seminar 010 12:00 AM
- ation Safety Seminar 10 03:00 PM
- eting 101 in a 2.0 World 010 07:00 PM
- il Meeting, Atlanta 10 02:00 PM

US Office Meet & Greet
Jun 29, 2010 02:00 PM
[Calendar](#)

Featured: News & Resources

Families Served Sample Press Release
HFHI recently announced the number of families served in FY09 as a result of Habitat's efforts worldwide. Use this template press release to announce your affiliate's numbers to local media. You can also include a link to your annual report (if appropriate) to make a compelling case for supporting Habitat before the end of the year.
12/9/2009 8:54:02 PM | Recommended 3 times | [More](#)

Gifts-In-Kind Catalog Accepting Orders!
The new Gifts in Kind Catalog is now accepting orders! This one-stop-shop for accessing gifts-in-kind items centralizes orders online, ensuring greater accuracy and ease of use.
10/9/2009 4:10:27 PM | Recommended 1 time | [More](#)

Latest News / Resources (Set Preferences) **Featured** | [Recently Published](#) | [Highly Rated](#)

Workplace Giving Pilot Program Monthly Newsletter - JUNE 2010
Monthly newsletter focused on the Workplace Giving (WPG) Pilot Program with 9 participating affiliates aiming to raise more dollars through workplace giving.
6/25/2010 10:03:18 AM | [More](#)

U.S. Construction Definitions
This file contains the U.S. construction definitions which were developed to enable all U.S. affiliates to use the same criteria when reporting U.S. families served information through the quarterly Affiliate House Production Report.
6/24/2010 3:22:55 PM | [More](#)

Employee Discussions

- Bank of America Affinity Package - Credit Card, Debit Card & Checking Account
- Trouble Posting Reply
- Training Center
- Comparison Chart for Executive Directors
- Working with Local Government!

Forums

Active Forums

- Project Title
- Builders Co-op
- Box Truck questions
- Gmail
- Art Releases for Fundraiser
- Partners resisting working with their Advocate
- Postage stamps - donation

Pictured: Shifting to a content-based rather than an organization-based system supports cross-regional teams and shared information across regions.

The site structure is based on the tagging of resources and content. Navigation relies on these tags, helping to narrow users' view of content until they find the information they need. Within the *Knowledge Center*, tag browsing appears on the left. Users can select a topic or type to refine results. The number listed indicates the number of items in that category. If a user hovers the mouse over a subcategory, a tool tip appears offering further explanation and information.

The information displayed is based on the user's regional preference, as it is throughout the site. If they prefer, users can remove those preference filters using a helpful feature on the page. A blue bar at the end of the tag list tells users when a regional filter is applied, and provides a link to *View All*. This area also lists the number of additional resources available if the regional filter is removed.

Resource types include documents, manuals, links, and podcasts, among others. Podcasts are typically recordings of training conference calls. Placing them in the *Knowledge Center* lets users browse by topic and locate them alongside other content.

The body of the page includes introductory text, followed by a list of all resources, starting with featured resources (indicated in green). The topic manager selects these featured resources. The rest of the resources are listed based on user recommendations or popularity. Users can also list resources by date, with the most recent additions shown first.

The right side of the page displays news and events related to the displayed content.

Habitat for Humanity
My.Habitat 2.0 BETA

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Profile/Preferences | Region: US

HOME INSITE KNOWLEDGE CENTER FORUMS STORE CALENDAR

Feedback | Help Search Go!

Knowledge Center You are currently viewing My.Habitat 2.0 beta. [Return to My.Habitat 1.0](#)

Filtered By

Fundraising (remove)

[remove all filters](#)

Refine Further

Topics

- [Volunteer Engagement \(51\)](#)
- [Grants \(51\)](#)
- [Operations & Governance \(50\)](#)
- [Individual Donor \(40\)](#)
- [Corporate Partners \(28\)](#)
- [Fundraising Planning \(23\)](#)
- [Government Funding & Partnerships \(21\)](#)
- [Capital Campaigns \(21\)](#)
- [Awareness Raising \(19\)](#)
- [Advocacy \(17\)](#)
- [More >](#)

Types

- [FAQ \(110\)](#)
- [Info Sheet \(46\)](#)
- [How To \(35\)](#)
- [News \(24\)](#)
- [PowerPoint \(19\)](#)
- [Learning Resource \(18\)](#)
- [Brochure \(12\)](#)
- [Manual \(10\)](#)
- [External Link \(9\)](#)
- [HFHI Policy \(9\)](#)
- [More >](#)

Your Regional Filter is applied | [edit](#)
[view all \(53 additional items\)](#)

Fundraising

Welcome to Fundraising on My.Habitat 2.0 beta. Here you will find resources related to developing resources, planning and executing fundraising programs, applying for and managing grants, recognizing donors, and more. Both the Fundraising and My.Habitat teams are grateful for your participation in the beta test.

266 Fundraising Resources

Sort by: [Relevance](#) | [Date](#)

Gifts-In-Kind Catalog Accepting Orders!

The new Gifts In Kind Catalog is now accepting orders! This one-stop-shop for accessing gifts-in-kind items centralizes orders online, ensuring greater accuracy and ease of use.

5/7/2010 3:03:15 PM | Recommended 1 time | [More >](#)

Resource Development AOM (2009)

The purpose of this manual is to help your affiliate establish an effective system for raising funds to build more houses and serve more families. This manual will assist you with some of the tools needed to plan and implement a successful

AM | [More >](#)

Workplace Giving Pilot Program Monthly Newsletter - MAY 2010

Monthly newsletter focused on the Workplace Giving (WPG) Pilot Program with 9 participating affiliates aiming to raise more dollars through workplace giving.

6/25/2010 10:04:45 AM | [More >](#)

Who in the affiliate is responsible for creating a strategic plan?

The process for setting goals and objectives and the strategies for reaching those goals is a collective effort. The approach to the process is varied, depending on how much time the group can devote to the process, and who is facilitating the process. However, it is recommended that someone from outside the organization facilitate and record. It is very difficult to be part of the process and also wear the...

1/13/2009 8:09:03 PM | [More >](#)

Related News

- [Workshop Proposals sought for National Conference](#)
06/28/2010
- [Free Conference Call Training: Schedule for June, July, August, & September 2010](#)
06/28/2010
- [Video Clips & Workshop Presentations from the 2009 National Conference: Available for Self-Paced Learning](#)
06/26/2010
- [Is your affiliate receiving NSP funds? Please complete the HFHI NSP Survey by June 30](#)
06/24/2010
- [Wells Fargo Makes \\$8 Million Contribution to Habitat for Humanity's Neighborhood Revitalization Initiative](#)
06/10/2010
- [More News](#)


Related Events

- [Jul 22, 2010 12:00 AM](#)
Iowa Sustainable & Affordable Homes Workshop
- [Calendar](#)

US Support Center

[?](#) Can't find what you're looking for? Let the US Support Center help!


Pictured: Content appears in a faceted or tag-based structure, letting users make selections to filter results until they find the required resource.



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[HOME](#) [INSITE](#) [KNOWLEDGE CENTER](#) [FORUMS](#) [STORE](#) [CALENDAR](#)


[Feedback](#) | [Help](#)


Knowledge Center
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Filtered By
Fundraising ([remove](#))
FAQ ([remove](#))
[remove all filters](#)

Refine Further
Topics
[Individual Donor \(21\)](#)
[Fundraising Planning \(15\)](#)
[Corporate Partners \(14\)](#)
[Grants \(13\)](#)
[Operations & Governance \(9\)](#)
[Major Gift \(8\)](#)
[Awareness Raising \(7\)](#)
[Capital Campaigns \(6\)](#)
[Annual Fund \(5\)](#)
[Workplace Giving \(5\)](#)
[More](#)
Types
[Info Sheet \(3\)](#)
[Learning Resource \(1\)](#)
[How To \(1\)](#)
[Contact Info \(1\)](#)
Your Regional Filter is applied | [edit](#)
[view all \(18 additional items\)](#)


110 Fundraising, FAQ Resources
Sort by: [Relevance](#) | [Date](#)


FAQ


[How can planned giving "legacy donors" be recognized?](#)
It takes a special kind of person to make plans for the benefit of unknown persons in the unknowable future, and it is important to recognize these special donors. To do so, Habitat for Humanity International has developed a Legacy Society. Anyone who makes estate plans in favor of any Habitat entity is eligible for membership, which is obtained by telling Habitat International's Planned Giving Department that such plans exist ...
1/13/2009 5:29:46 PM | Recommended 5 times | [More](#)


FAQ

[What is a capital campaign?](#)
A capital campaign is an intensive, structured effort to secure pledges and major gifts toward visionary and urgent needs completed within a finite time period, usually one year to eighteen months. The pledges are often received over three to five years. A capital campaign should never be considered as another fundraising technique in an affiliate's annual-giving strategy or to make up for a shortfall in annual giving. Casting a bold...
1/16/2009 5:12:49 AM | Recommended 4 times | [More](#)



FAQ

[What established theme builds have been used by Habitat for Humanity throughout the country?](#)
Established theme builds include: Women Build: The national Women Build effort was launched in 1998 to promote the involvement of women in the construction of Habitat houses, with training provided in a supportive environment.
1/13/2009 5:38:42 PM | Recommended 2 times | [More](#)


FAQ

[How do we convert volunteers into donors?](#)
In addition to the need for recording names, it is critically important that everyone in your affiliate treats the volunteer experience as a "donor acquisition" opportunity. To maximize your chances of converting a volunteer into a donor, make sure: The volunteer recruitment process is professional. The worksite is always well managed, with needed tools and materials onsite when volunteers arrive. The onsite experience should be more than just "construction"; volunteers...


Related News
Workshop Proposals sought for National Conference
06/28/2010
Free Conference Call Training: Schedule for June, July, August, & September 2010
06/28/2010
Video Clips & Workshop Presentations from the 2009 National Conference: Available for Self-Paced Learning
06/26/2010
Is your affiliate receiving NSP funds? Please complete the HFHI NSP Survey by June 30
06/24/2010
Wells Fargo Makes \$8 Million Contribution to Habitat for Humanity's Neighborhood Revitalization Initiative
06/10/2010
[More News](#)

US Support Center

Can't find what you're looking for? Let the US Support Center help!

Pictured: The site's *Knowledge Center* tag browser with a second tag applied, in this case the tag "FAQ." The tag browser lets users drill down further. The numbers in parenthesis show users how many resources exist for each topic so they always know what to expect.

Users can recommend a resource if they find content on the site useful. A simple *Recommend This Resource* link appears at the top of the page, next to the number of times it has already been recommended. This information is used to order the information shown on category pages, helping put the most popular or useful content first.


Each content page also features a *Question/Feedback* link, encouraging active feedback about the site. Beneath the content, metadata is shown with the date the content was created and modified, and who made changes. Tags, including topics, types, and regions, are also listed. Beneath this summary, related content is listed. This list is based on the tags for the content that appears on the page.



Habitat for Humanity
 My.Habitat 2.0 BETA

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How can planned giving "legacy donors" be recognized?

[← Back](#) | ☐ Recommend this resource (Recommended 1 time)
 [Question/Feedback](#) | [Edit item](#)

It takes a special kind of person to make plans for the benefit of unknown persons in the unknowable future, and it is important to recognize these special donors. To do so, Habitat for Humanity International has developed a Legacy Society. Anyone who makes estate plans in favor of any Habitat entity is eligible for membership, which is obtained by telling Habitat International's Planned Giving Department that such plans exist. Benefits of membership include a framed certificate, lapel pins, and publication of names in the quarterly planned giving newsletter if desired by the donor.


Affiliates are encouraged to hold local recognition events. Having an annual banquet for the exclusive benefit of Legacy Society members helps stimulate interest and motivate additional members.


The HFHI Planned Giving Department can be reached at (800) 422-4828, ext. 7692 or plannedgiving@habitat.org


DocID: g2e9f4
 Publishing Site: FundingSupport/USResourceDevelopment
 Created: 01/10/2009 10:47:56 by Elizabeth Brunner
 Last Modified: 01/13/2009 17:29:46 by System Account

Topics: Fundraising, Planned Giving, Donor Recognition
 Types: FAQ
 Regions: United States










Related FAQs


What are memorial gifts?
 Memorial Gifts are often made "in lieu of flowers" upon someone's passing or might be made later in memory of a loved one. Such gifts also may take place without your foreknowledge; and you may only learn of it when the gifts are received. These must be handled sensitively with prompt thank-you letters that are sensitive to the occasion – not your standard letter acknowledging a gift. A phone call...
 1/13/2009 5:27:50 PM | [More](#)


Where can we find sample thank-you letters for donors?
 Here are some resources that might be helpful:
 1/5/2010 1:15:33 PM | [More](#)


What are the tax requirements for acknowledging charitable gift contributions?
 If a donor receives goods or services of substantial value in recognition of their donation, they may be required to deduct the value of the benefit from the value of their donation for tax reporting purposes. Consult with a CPA and be certain to observe IRS requirements regarding the disclosure to donors of the

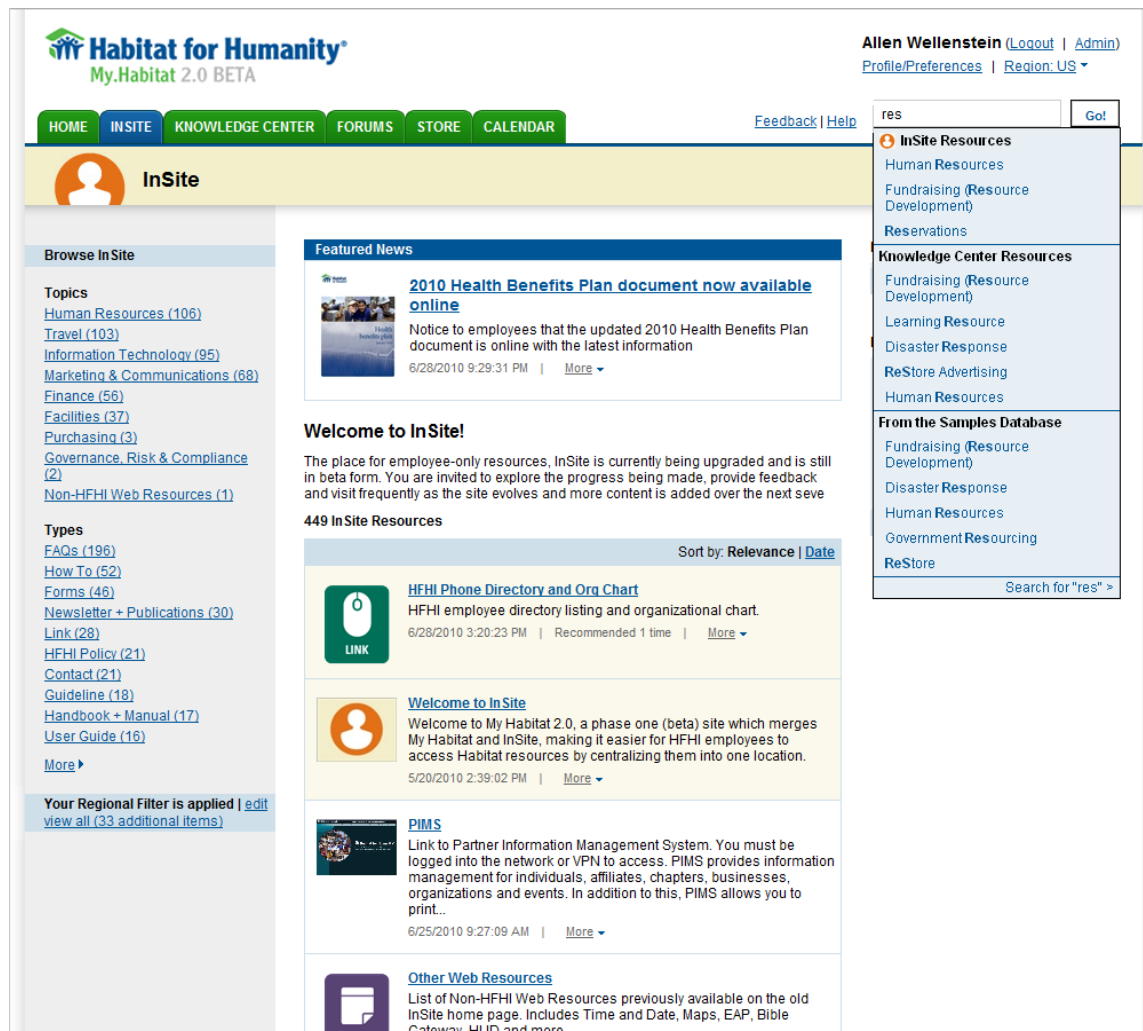
Related Resources

 Workplace Giving Pilot Program May Conference Call
 Campaign case for support-global
 Campaign vision page (photos)
 Campaign vision page
 HFHI Planned Giving Public Information on www.habitat.org
 Wells Fargo Makes \$8 Million Contribution to Habitat for Humanity's Neighborhood Revitalization Initiative
 Q&As about the World of Hope campaign
 Workshop Proposals sought for National Conference
 Free Conference Call Training: Schedule for June, July, August, & September 2010

Pictured: Users can recommend a resource by clicking a link at the top of the content area. This lets the site prioritize content based on recommendations.

Curated search helps users locate information. The site uses SharePoint's search tools, but the intranet team has added what they call a *curated search* on top of the tool. When a user starts typing a search query, the site suggests related terms based on the most popular topics across the site. These related terms are set up by the operations team.

The tool recognizes synonyms, helping users locate content under related headings. The team monitors searches, and if they find a search resulted in no good destination, they add one.




Pictured: A *curated search* suggests terms related to what the user is typing. This lets users select from suggestions, which return relevant results.

A master *Calendar* is a new addition to the site. As with site content, events were also listed based on departments or groups, but there was no central calendar for knowing what was going on around the organization. Now, the master *Calendar* shows all events in a single view, which has proven very helpful for planning.

Events are shown based on the user's region and topic preferences, but users can remove these constraints when viewing the calendar. The left side of the page lists the types of events currently shown. Users can remove any of these types, or show additional event types (listed in a second area on the left). They can also remove the regional filter to see events across all regions.

The *List View* and *Employee Events* tabs allow affiliate and employee-only events to be viewed by topic using the tag browser. Users can view both upcoming and past events in this way.


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CALENDAR

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[Calendar View](#) | [List View](#) | [Employee Events](#)

Showing Events For:

- Travel (2) [\(remove\)](#)
- Human Resources (2) [\(remove\)](#)
- US Office (4) [\(remove\)](#)
- Learning Resource (2) [\(remove\)](#)
- Fundraising (2) [\(remove\)](#)

Also Show Events For:

- Marketing + Communications (2)
- Advocacy (1)
- Operations + Governance (4)

Showing: United States
[Show Events from all Regions](#)


June 2010						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
30	31	June 1	2	3	4	5
	US Conference					Financial Risk
6	7	8	9	10	11	12
				Southwest Sustainable Workshop		
13	14	15	16	17	18	19
	US Communications Retreat					
		Test Event	Test LR Networking			
20	21	22	23	24	25	26
			Virginia SSO GreenWorks Symposium			
				KY SSO Green Housing Summit		
27	28	29	30	July 1	2	3
	Q2 Reports Due	US Office Meeting			HFHI Office Closed	

Pictured: The master *Calendar* shows all events, based on user preferences.


The site houses many applications. A main goal of the site was to have a central portal where all resources and tools could live, which required that the site architecture support the integration of applications.

One of these applications is the *Gifts in Kind Catalog*. This area offers a way for affiliates to "shop" for donated materials. Users can browse the catalog for (mostly free) materials and place orders.

The system integrates with donors' back office systems, providing detailed reporting, and financial and donation reconciliation. The site also integrates and presents several other applications as part of the site, including a *Build Brand Store* where affiliates can order business cards and letterhead, and *Project Based Funding*, which is a database of approved international projects in need of funding.


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Profile/Preferences | Region: US

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[CALENDAR](#)
Feedback | Help


Gifts In Kind
Question / Feedback on Gifts in Kind

Browse the Catalog


Donors
[Schneider Electric/Square D \(225\)](#)
[Dow \(12\)](#)
[Valspar \(11\)](#)
[Kohler \(11\)](#)
[Yale \(6\)](#)
[Whirlpool \(2\)](#)
[Hunter Douglas \(2\)](#)
[Mobile Mini \(2\)](#)
[Tile Partners for Humanity \(1\)](#)
[Larson Manufacturing \(1\)](#)
[Graphisoft \(1\)](#)

Product Categories
[Electrical \(225\)](#)
[Building Materials \(13\)](#)
[Kitchen & Bath \(12\)](#)
[Paint \(11\)](#)
[Doors \(7\)](#)
[Appliances \(2\)](#)
[Storage \(2\)](#)
[Windows \(2\)](#)
[Architectural \(1\)](#)

Welcome to the Gifts in Kind Catalog

Welcome to the Gifts in Kind Catalog, your one-stop-shop for all gifts in kind items. By centralizing all items into one online location, affiliate orders can be processed faster and with greater accuracy. The Gifts in Kind Catalog is easy to use and offers descriptions and photos of most products. Start exploring and saving on construction costs today!




Featured GIK News





[Valspar Offers New Features in the GIK Catalog](#)




Valspar is offering two new features in their 2010 Program with HFHI affiliates-the ability to order paint and have Valspar tint it and the ability to place orders for less than 240 gallons.




Jun 28, 2010 11:45 AM

GIK Partners

Frequently Asked Questions

[Is there training available for the GIK Catalog?](#)
[Who do I contact if I have questions about the GIK Program?](#)
[Who do I contact if I have questions about how to use the GIK Catalog?](#)
[Can affiliates write thank you letters to GIK national partners?](#)
[What do I do if I'm interested in ordering tinted paint through the Valspar Program?](#)
[More FAQs](#)

GIK News

[Whirlpool renews commitment to Habitat for Humanity through 2010](#)
Oct 05, 2009 10:38 AM
[Tile Partners for Humanity pledges \\$2.5 million to Habitat for Humanity](#)
Oct 04, 2009 11:11 PM
[More News](#)

Pictured: The *Gifts In Kind Catalog* lets users shop for building materials donated to HFHI.

Informative, reliable content is key on the site. One area of particular importance is the site's *Affiliate Operations Manuals* (AOMs). These manuals provide operational guidance for affiliates on topics such as construction, family services, and financial policies and procedures. An AOM is intended as an online reference to solve pressing, real-world problems.

Putting an AOM together is a group effort. A team of experts led by a project manager develops the content, which is then reviewed by legal as well as the AOM's sponsor and publishing group owner. Creative Services edits and formats the document, while the MH Librarian makes the PDF version with internal navigation and links to related resources.

Users can open the entire manual online, download a copy for local use, or navigate directly to a specific section. These documents are among the most commonly used content on the site. Affiliate Support Center employees not only use the information to answer affiliate questions, but also show constituents how to use the materials themselves.

The materials were previously distributed in print, which made them difficult and expensive to revise and redistribute. Although the idea of online manuals was initially met with resistance, the benefit of having immediate access to the most up-to-date information — and the ease of updating information in a digital format — outweighed any concerns.

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Family Selection AOM (2010)

← Back ☐ Recommend this resource (Recommended 12 times) [Question/Feedback](#) | [Edit](#)

Users have several options to engage this manual, including:

- Use the launch page below to open the manual online and go directly to a specific Chapter.
- Download the manual for online desktop use (requires Internet connection - all links will function)
- Download the manual for offline desktop use (Internal links will work, but links to resources on My.Habitat or Internet will not function)
- Print a hard-copy of all or part of the manual (93 pages without appendices; 307 pages with appendices).

Family Selection Affiliate Operations Manual (AOM): This manual describes how to select well-qualified families. Although the volume and pace of family selection may increase with affiliate growth, the process does not change. This manual is equally applicable to all affiliates—from the smallest, all-volunteer affiliate to the largest, fully staffed. The manual is organized to support a structured and well documented family selection process. The text is supported by eleven charts, 97 appendices, and 52 links. All Habitat legal memos related to family selection plus the Application for Housing are updated and included. Revised: 25 March, 2010 (errata update: 28 Apr, 2010)

[Family Selection AOM](#)

[About the Family Selection AOM](#)
Ministry & Mission, Overview of the Selection Process

[Chapter 1 – Prepare for Family Selection](#)
Getting Organized, Legal, Family Selection Documents, Developing Family Selection Criteria

[Chapter 2 – Reach Out to Families](#)
Promotion, Your Goal, Your Plan, Affiliate PR, Action Steps - Advertising, Action Steps - Networking, Market Research, Legal Considerations

[Chapter 3 – Perform the Application Work](#)
Obtaining Completed Homeowner Applications, ECOA Requirements, Application Timeline, Qualification & Verification,

[Chapter 4 – Select the Family](#)
Final Review, Report to Board, Board Action, Applicant Waiting List

[Chapter 5 - Communicate the Decision](#)
Notification - Denial, Notification - Approval, DeSelection

[6 - Glossary of Terms](#)

Related FAQs

Should my affiliate use the same income guideline for A Brush with Kindness applicants that it uses for homebuyer families?

How much staff time (selection, interview, etc.) would be invested in working with potential A Brush with Kindness families, not counting time spent on actual construction/rehab/repair?

Can A Brush with Kindness work be done on rental property?

Are homeowners eligible for A Brush with Kindness if they don't have homeowner's insurance?

Homeowner Application: Where can I download a copy of the HFHI Homeowner application?

Is there a minimum number of sweat equity hours required per A Brush with Kindness (ABWK) project?

Is there a minimum or maximum number of families we must work with through A Brush with Kindness (ABWK)?

How should homeowners pay for ABWK projects?

Why should my affiliate participate in A Brush with Kindness in addition to building new homes?

Sweat Equity: Should we state that Sweat Equity is part of their down payment toward their Habitat home?

Related Resources

- Coastal NJ ABWK
- ABWK Process Summary
- Report on Repair and Rehab Survey of HFH Affiliates
- Overview of Anti-Discrimination

Pictured: *Affiliate Operations Manuals*, which used to be distributed in print format, are now available online.

Collections are another content type that has excited Habitat's publishers. The collections feature lets publishers create a focused group of resources assembled from throughout the site. For example, a marketing expert can compile a collection to help an affiliate publicize a fundraising event. *Collections* can include content in any form, so they can include templates, graphics, real-world examples, or even be tied to a discussion group.

Publishers are taking this tool beyond what the developers envisioned for it — in a good way. Publishers are creating knowledge bases on topics, which can then be featured in the *Knowledge Center* as a single resource.

The screenshot shows the Habitat for Humanity My.Habitat 2.0 BETA website. The header includes the logo, navigation links (HOME, INSITE, KNOWLEDGE CENTER, FORUMS, STORE, CALENDAR), and user information for Allen Wellenstein. The main content area features a 'Collection' titled 'Achieving good standing'. This collection includes two resources: 'Final Achieving in good standing status eff 070110' and 'PowerPoint - Final Good Standing Criteria eff 070110'. Below these, there are 'Supporting Resources' including 'U.S. Affiliation Agreement', 'Quality Assurance Checklist', and 'U.S. Affiliated Organization Covenant'. A 'Related FAQs' sidebar on the right lists questions about the Pioneers in Excellence program, award criteria, and good standing requirements.

Pictured: A collection is a content type that lets publishers group related information together as one resource.

Publishers contribute from all around the organization and all over the globe, which helps the site offer diverse and valuable information. The team offers many resources to help publishers, but found that most publishers add content in bursts, rather than consistently. As a result, people forget how to publish content and how to create strong metadata. They also forget best practices and time-saving techniques. And a lag between bouts of publishing can create issues related to employee turnover.

Realizing this, the team has tried to provide specific training as needed, with reusable training resources. Rather than focusing on lengthy explanations, the team tries to focus on information that is of most immediate use, providing instructions for routine tasks and using tools like annotated screenshots. The team emphasizes best — and worst — practices.

Although the team would ideally like to fully explain the nuances of content and metadata creation, they understand that part-time publishers who aren't constantly uploading content will be unlikely to retain or appreciate such knowledge. So, team

members do their best to help on a case-by-case basis, offering their expertise to aid publishers.

That said, team members appreciate that this problem stems from the fact that their publishers are subject matter experts with many other responsibilities. The publishers' busy schedules and attention to detail are what makes them highly valued contributors to the site, but also what makes continual training necessary.

By fixing the site structure, breaking down site barriers, cleaning up site content, and providing tools and information for users' daily needs, the HFHI intranet team has created a site that truly supports the global organization.

BACKGROUND

MH 2.0's goal is to provide a single location where HFHI employees and the employees/volunteers of affiliates worldwide can access and share the knowledge, resources, and tools they need in their mission of eliminating poverty housing.

The key to keeping the HFHI intranet fresh and useful is the organization's commitment to continual improvement.

"Even the first version of My.Habitat had a robust feedback mechanism, so we could hear from our users what they liked and what they didn't," says Drew Hancock, HFHI Senior Webmaster. "We also participate in many regional, national, and international Habitat conferences, setting up booths where affiliates and staff can come by and share their thoughts, feedback, and suggestions."

The intranet team regularly surveys users, and a steering committee made up of representatives from the various departments, regions, and user groups across the organization channels feedback from the site's constituents back to the design/operations team.

So, when it was time to design MH 2.0, the team had lots of feedback and suggestions to inform its redesign effort.

Project goals for the redesign project included:

- **Simplify presentation of the organizational structure** to help users find the content they need to perform their job functions, regardless of who owns a particular piece of content.
- **Establish clear ownership** of each site resource to reduce duplication, ensure accuracy, and improve resource timeliness.
- **Make the site as useful** to the organization's international constituents as it is to its US audience.
- **Create a one-stop-shop for sharing HFHI knowledge and tools** so that users (particularly employees) are no longer confused as to where to find authoritative information.

Evolving Over Time

HFHI's original extranet, PartnerNet was built to serve as a single destination for information sharing among the organization's global affiliates. It was essentially just a collection of subsites broken down by program, department, and initiative. But with

PartnerNet as a launching point, the organization was propelled to develop its first intranet, called *InSite*.

Although both sites were welcome additions to the organization's knowledge network, it wasn't long before both grew "out of control and difficult to use," according to Hancock. He identifies three main reasons for the sites' eventual demise:

- The navigation schemes couldn't expand to accommodate growth over time
- Just about anyone in the organization could publish content
- The organization lacked an effective governance model to control the content quality

My.Habitat (1.0)

In 2007, a rebranded and redesigned PartnerNet was launched as MH (1.0). This new site, a precursor to the organization's current intranet, was built on SharePoint 2007. And, although the site was very well received, user feedback revealed it had one major shortcoming: the navigation was organized according to content ownership. This paradigm didn't serve the users well.

"This made it confusing to know where to find something," says Allan Wellenstein, President and Chief Information Architect of AWS, the company that partnered with HFHI to build this early version of MH.

MH 1.0 was only HFHI's extranet. HFHI had a separate intranet, *InSite*, which was the default home page for all employees.

"Content published for affiliates, however, was typically also relevant to employees and was therefore often (but not always) posted to both sites," says Hancock, adding, however, that it was not always updated in both places, "causing confusion as to where employees should go for the latest and greatest."

Solving the Navigation Problem

HFHI's enterprise architecture group had done a study on content management and collaboration platforms and had settled on SharePoint as a platform for MH 1.0. The group's decision was based on its feature set, cost, and integration with tools already in use. For the initial rollout, SharePoint was used pretty much out-of-the-box, which meant that the team encountered a common problem: the site navigation was aligned to content ownership, rather than use.

"One of the common issues you see with SharePoint sites, particularly in intranets, is an organizational structure aligned primarily — sometimes exclusively — with the organization's org chart," says Wellenstein.

SharePoint uses the site/subsite structure both as a way to build navigation and as a mechanism for creating security boundaries.

"As a result, content is often grouped more by who owns it rather than how someone might think to look for it," he says. "This was one of the main reasons we developed Content Slammer: to explicitly separate the ownership and management of content from how it's browsed by end users."

Rather than adhere to the content ownership model, the company looked for a solution that would allow content created and owned by different groups within HFHI to be browsed by topic or content type.

The solution, developed by AWS for another SharePoint client, was to create a SharePoint extension in which SharePoint content could be pushed to a SQL server. This allowed the mapping of complex relationships in SharePoint to SQL and thus enabled more logical browsing for users.

The tool, *SharePoint List Association Manager* (SLAM), let developers grab content published from the various MH sites and organize it in various ways to suit their needs. “In other words,” says Wellenstein, “we could continue using SharePoint to allow different groups within the organization to manage their content — something SharePoint does extremely well — but we could grab that data and aggregate and display it in a way that would be more user-centric.

“The big breakthrough here was explicitly separating the tasks of managing content from how that content is browsed.”

Separating Content Ownership from Browsing Options

Although SharePoint remains the site’s CMS, MH 2.0 separates content ownership from how the content is browsed. Each department or program has a “publishing site” where they publish their FAQs, downloads, events, podcasts, and so on, and tag them by topic and type of content. Users then browse content based on topic or content type rather than needing to find the SharePoint site where that content lives.

Content in MH 2.0 is also tagged with language and regional relevance. Users set their regional and language preferences and see only relevant content as they browse the site. In this way, the organization has helped address an issue brought forth by its international users: that content was too US-centric.

With this, designers have seen much greater adoption of MH outside of the US.

Testing the New Navigation Scheme

The team phased in the new navigation scheme by conducting an initial trial. In January of 2009, in time for a national affiliate conference, the team launched *Knowledge Center*, a new MH tab that let users browse key resources across the organization by topic or content type, regardless of which group published them. And the users loved it.

“My favorite example to illustrate the power of the *Knowledge Center*’s new navigation approach is a resource describing HFHI’s official policy regarding having minors volunteer on a Habitat build,” says Wellenstein. “In My.Habitat 1.0, users might look to find that under the *US legal* site, the *Volunteer Management* site, the *Youth Programs* site, or the *US Construction* site.”

Where they would actually find that document depended on which group had published it.

“In order to have it appear in all of those sites, it would have to be duplicated — which would make management a nightmare,” he says.

In the new *Knowledge Center*, users could easily find the policy regardless of which topic tag they used; the result has been enthusiastic support for the new scheme.

"The feedback we got on the *Knowledge Center* was great, so we decided to extend the concept to the entire site," says Hancock. "Thus, the plan for My.Habitat 2.0 was born."

Consolidating Resources

Building on the initial trial, the concept was then applied to other parts of the site to ease the findability of key content across the site.

In addition to applying the Content Slammer approach to the entire site — rather than just to the key resources for each topic (as in the *Knowledge Center*), the team added a profile system. This lets users set their topic preferences, as well as regional and language preferences, so that they see the content they most care about on their home page and, as they browse the site, they see only relevant content based on their region.

In addition to improving information findability, MH 2.0 delivers a true portal architecture that houses, in one place, all the resources and tools available for employees and affiliates. These include a discussion forum, an organization-wide calendar, a system for ordering customized letterhead/marketing materials, a shopping cart for ordering donated building materials, a database of affiliate samples/templates, a searchable photo library, an international volunteer trip scheduling system, and more.

The screenshot shows the My.Habitat 2.0 website interface. At the top, there is a navigation bar with links for HOME, FORUMS, and STORE. A welcome message for Alan Wellenstein is displayed, along with links for Subscriptions and Logout. Below the navigation bar, the Habitat for Humanity logo is visible, followed by a search bar and a list of links: Affiliate Samples, Training Resources, PhotoNet, Feedback, and Help. The main content area is divided into several sections:

- HFHI**: A list of links including US Public Relations and Marketing, US Legal Support, US Family Selection / Support, US Construction, AP Communications, ECA Advocacy, ECA Communications, ECA Construction, International Construction/Appropriate Technologies, International Finance, International Housing Finance, US Board and Committee Development, US Community Development / Strategic Alliances, US Finance and Administration, US Human Resources Support, US Land Acquisition & Development, US State Support Organizations, and US Volunteer Management.
- Business and Operations**: A list of links including US Public Relations and Marketing, US Legal Support, US Family Selection / Support, US Construction, AP Communications, ECA Advocacy, ECA Communications, ECA Construction, International Construction/Appropriate Technologies, International Finance, International Housing Finance, US Board and Committee Development, US Community Development / Strategic Alliances, US Finance and Administration, US Human Resources Support, US Land Acquisition & Development, US State Support Organizations, and US Volunteer Management.
- Funding and Support**: A list of links including US Public Relations and Marketing, US Legal Support, US Family Selection / Support, US Construction, AP Communications, ECA Advocacy, ECA Communications, ECA Construction, International Construction/Appropriate Technologies, International Finance, International Housing Finance, US Board and Committee Development, US Community Development / Strategic Alliances, US Finance and Administration, US Human Resources Support, US Land Acquisition & Development, US State Support Organizations, and US Volunteer Management.
- Organizational Learning**: A list of links including US Public Relations and Marketing, US Legal Support, US Family Selection / Support, US Construction, AP Communications, ECA Advocacy, ECA Communications, ECA Construction, International Construction/Appropriate Technologies, International Finance, International Housing Finance, US Board and Committee Development, US Community Development / Strategic Alliances, US Finance and Administration, US Human Resources Support, US Land Acquisition & Development, US State Support Organizations, and US Volunteer Management.
- Programs**: A list of links including US Public Relations and Marketing, US Legal Support, US Family Selection / Support, US Construction, AP Communications, ECA Advocacy, ECA Communications, ECA Construction, International Construction/Appropriate Technologies, International Finance, International Housing Finance, US Board and Committee Development, US Community Development / Strategic Alliances, US Finance and Administration, US Human Resources Support, US Land Acquisition & Development, US State Support Organizations, and US Volunteer Management.
- Latest Affiliate Samples**: A list of links including 06/30/10 - Partnering Agreement for Home Reconstruction after Disaster, 06/30/10 - Regional Manual for Long Term Recovery Committee after Disaster with Habitat References, 06/29/10 - Largest Donation in Affiliate History Anniversary Gift from Financial Services Company, and 06/29/10 - A Brush With Kindness: Application Instructions and Family Selection Criteria.
- News and Announcements**: A list of links including US Office, Help Habitat stop fraudulent e-mails, FY11 U.S. Office goals: Supporting affiliates in four major ways, Is your affiliate receiving NSP funds? Please complete the HFHI NSP Survey by June 30, and More US Office News.
- US Office**: A list of links including Help Habitat stop fraudulent e-mails, FY11 U.S. Office goals: Supporting affiliates in four major ways, Is your affiliate receiving NSP funds? Please complete the HFHI NSP Survey by June 30, and More US Office News.
- US Training and Education**: A list of links including US Office, Help Habitat stop fraudulent e-mails, FY11 U.S. Office goals: Supporting affiliates in four major ways, Is your affiliate receiving NSP funds? Please complete the HFHI NSP Survey by June 30, and More US Office News.

Pictured: The intranet in its 1.0 version. A major usability issue with this version was URLs; because of the native structure of SharePoint URLs, it was very difficult to reliably point someone to a particular resource within the intranet.

TIMELINE

HFHI INTRANET TIMELINE	
Milestone Date	Milestone Description
July 2000	Launched PartnerNet, the first version of the organization's extranet using Stellent Content Management System
July 2002	Developed InSite, the organization's first internal staff-only intranet
March 2006	Work begins on PartnerNet redesign
April 2007	Organization launches beta PartnerNet (later renamed My.Habitat 1.0), which was redesign on SharePoint 2007
January 2009	<i>Knowledge Center</i> tab launches on top of MH 1.0 to let users browse key resources across the organization by topic or content type, regardless of which group published it
June, 2009	Work begins on MH 2.0 redesign
September, 2009	MH 2.0 launches to the organization (Beta)
Through January 2011	MH 2.0 remains in beta

INTRANET TEAM



Pictured: The HFHI intranet team: (top, left to right) Lisa Reitz, Drew Hancock, and Allan Wellenstein (AW Systems); (bottom, left to right) Doug Green (AW Systems), Connie Steward and Jill Claflin. **Not Pictured:** Bob Norris.

GOVERNANCE

Ownership

MH 2.0 benefits from sponsorship by several senior stakeholders across the organization, rather than a single department owner.

The shared sponsorship model serves the site well. Sponsors have a strong incentive to ensure that MH investments are tied directly to strategic goals in the organization's five-year plan.

"While a shared approach may sound less ideal than having a clear-cut owner," says Hancock, "this interest-based sponsorship model has been a key determinant in sustaining funding during an extended period of constrained budgets."

"The HFHI Board of Directors maintains vigilant oversight on expenditures and requires that they be explicitly tied to strategic goals; hence sponsors have a strong incentive to ensure that MH 2.0 investments pass that test," says Hancock.

"Another positive aspect of shared ownership is derived from the process of priority-setting and decision-making," he says. "Sponsors have two avenues to advocate for

enhancements: A) Persuade the MH Steering Committee to prioritize their improvement out of existing funds, or B) Use discretionary funding to underwrite a special project.”

While this approach works, Hancock admits it is anything but efficient.

“The MH Steering Committee invokes an advocacy approach for priority setting that pits desired enhancements in a competition for scarce resources,” he says. “This typically results in a detailed, comparative analysis of feasibility and return on investment (ROI) that informs effective decisions.”

This process is challenging when difficult trade-offs must be made, but it fosters a sense of ownership among those who engage in the discussions. In a very real sense, even those whose desired enhancements aren’t chosen feel that they’ve contributed. Moreover, the option always exists for an advocate to locate funding for a special project, so being turned down is not as climatic as it might otherwise be.

“One can count on lively debate from many perspectives, with strong opinions being aired,” says Hancock. “Nevertheless, the lack of efficiency is certainly worth the price in that the successful advocate must articulate a compelling argument in the face of ardent critique to prevail.”

Personnel from three departments — IT, Communications, and Learning and Organizational Development — provide day-to-day operational support. These departments coordinate both the operational budget and operational activities, including administration, infrastructure, quality control, and training.

INTRANET TEAM RESPONSIBILITIES	
Role/Members	Responsibilities
MH sponsors include: <ul style="list-style-type: none"> • Communications • Learning and Organizational Development • HR • US and Canada • Global Programs • International 	<ul style="list-style-type: none"> • Establish and control top-level topic tags • Establish guiding principles • Assign roles and responsibilities for publishing content • Secure funding
MH Steering Committee members include: <ul style="list-style-type: none"> • Technology Subcommittee • Content Subcommittee • Users Subcommittee 	<ul style="list-style-type: none"> • Shape strategy • Approve design requirements • Make recommendations for investments (budgets) • Facilitate advisory groups (three groups) • Monitor results (statistics) and suggest changes <p>Technology subcommittee: focuses on architecture, functionality, and reliability</p> <p>Content subcommittee: reviews feedback and recommendations for content development and usability of the tools for contributors</p> <p>Users subcommittee focuses on appropriateness of published content, gaps in content, and ease of use</p>

MH Operations Team includes: <ul style="list-style-type: none"> • Communications • Learning and Organizational Development • IT • Developers 	<ul style="list-style-type: none"> • Serve as technical and design lead for MH • Serve as technology liaison for MH Operations Team • Serve as primary contact for InSite publishing • Serve as primary contact for Knowledge Center publishing • Establish standards for organizing Knowledge Center content • Resolve conflicts among Publishing Group Owners (PGOs) • Schedule and train Knowledge Center PGOs and topic managers
MH Publishing Team includes: <ul style="list-style-type: none"> • Publishing Group Owners • Topic Managers • Forum Moderators • Site Contributors 	MH Publishing Team: <ul style="list-style-type: none"> • PGOs have the overall responsibility for maintaining content within their topic area. • Topic Managers contribute content; these subject matter experts share their specialized knowledge on selected topics. • Forum Moderators create a professional tone for the forum, review new threads and posts, and post comments as warranted. • Site Contributors are key-boarders who assist topic managers in publishing content

USERS

MH 2.0, HFHI's combination intranet/extranet, has approximately 25,000 registered users. And its user base is varied. More than 800 employees use the platform from five regional offices and from field offices around the world. Staff and volunteers of associated organizations including affiliates, state support organizations, national offices, ReStores, Campus Chapters, and more, also use the site. The goal is to have the site available to everyone across the organization regardless of role.

"We need to be sure that a volunteer at a small affiliate who needs, say, fundraising 101 content can find that, while the full-time construction manager at a larger affiliate can find the more advanced green building techniques for which she is looking," says Hancock.

Some of the users include:

- **HFHI employee administrative users**, who use the site primarily for basic HR/benefits/directory/community purposes.

- **HFHI subject matter experts**, who help further the Habitat mission and provide support to the staff and volunteers of affiliated organizations around the world.
- **Affiliate/National Office staff and volunteers**, who run the full gamut. Some affiliated organizations are tiny and have no full-time employees, while others are themselves somewhat large organizations with 50 or more employees.

URL AND ACCESS

ACCESS INFORMATION	
Item	Status
URL	http://my.habitat.org
Default Status	Each staff member's computer is set with http://my.habitat.org as the homepage when the computer is issued, but they are free to change that if they wish.
Remote Access	MH is accessible both through the LAN and remotely through active directory logins for internal staff and through forms-based authentication for external (non-HFHI staff) users. The intranet-only portion of the content is accessible only with active directory logins.

DESIGN AND USABILITY

The Agency as Collaborative Partner

HFHI partnered with AWS for both the first version of MH and the 2.0 redesign. This partnership was a strong collaboration between the internal HFHI team and AWS. In the discovery/ideation/design phase, AWS partnered with representatives of the Communications and the Learning and Organizational Learning departments and then developed the site under the technical oversight of the Habitat IT department.

While the site's requirements analysis and design were very much team efforts, development was mostly outsourced to AWS.

"Solution Design": Defining Scope Through Consensus

Both projects started with a known budget and timeline and a list of very loosely defined goals the organization wanted to accomplish. AWS led a formal needs assessment/scoping exercise, called the "Solution Design" process, and it was through this process that the two teams agreed on the formal scope of work.

The Solution Design process involved key stakeholders across the organization, both internal and external, in a series of brainstorming sessions, focus groups, and design sessions where the groups prioritized goals and explored various approaches.

According to Hancock, they systematically defined and prioritized the goals and objectives, and “explored different approaches and iteratively and collaboratively defined what we would build. During that process, the design team evolved wireframes, which we shared with a larger group to get feedback.”

The wireframes served as paper prototypes so the teams could elicit feedback about what worked and what didn’t early on in the design process. This process was very efficient at surfacing issues and finding solutions; by the time the Solution Design document was delivered (AW System’s first formal deliverable), there was already broad consensus/agreement within the organization on the approach.

Learning Through User Testing

The team employed formal usability testing prior to launching the *Knowledge Center* upgrade to MH 1.0. Remote usability screen-share test sessions were conducted with users in affiliate offices.

“They [the users] were assigned tasks to complete, and we had them think out loud as they thought about where to click to find the answers,” says Wellenstein. “One interesting thing we learned was that users were not looking on the right-most call-out column where we featured related FAQs. Even if the question we asked them to find the answer to was almost verbatim the question shown on the right, users were still exploring the center column of the page, looking for the answer.”

As a result of the user testing, they integrated the FAQs directly into the *Knowledge Center* responses area.

A similar study was conducted before the organization launched an online ordering system. “We were able to avoid user confusion by placing simple instructions in a few key areas,” he says.

“Every time we do these simple usability studies, even though we aren’t doing formal testing in a usability lab, I’m always struck by how much we learn.”

Gathering Feedback

Because both the HFHI and AWS teams are committed to maintaining a continual improvement cycle, they’ve employed ongoing user feedback mechanisms to keep an active user dialogue open even now that the redesign is live. Feedback mechanisms include discussion forums, a site-based feedback management system, and having team members staff conference booths to encourage face-to-face dialogue.

These efforts help team members collect feedback on an ongoing basis. By refining and prioritizing that feedback, they’re able to execute on iterative site enhancements.



Forums

You are currently viewing My.Habitat 2.0 beta. [Return to My.Habitat 1.0](#)

» Discussions

Employee Discussions

Forums	Last Post	Threads	Posts
FYI: For Your Information	Windows XP Zero... by [User] Fri, Jun 18 2010 4:50 PM	2	3
Staff Moves	Staff Moves forum... by [User] Sun, Oct 4 2009 10:29 PM	1	1
Prayers and Praise	HFHI Weekly Prayer... by [User] Tue, Jun 29 2010 9:18 AM	6	6
Classifieds	Free AT&T phone... by [User] Tue, Jun 29 2010 3:36 PM	28	37

For Everyone's Information

Forums	Last Post	Threads	Posts
News / Announcements	Re: Postage stamps... by [User] Mon, Jun 28 2010 12:05 PM	92	181
Prayers and Praise	Re: Restart with... by [User] Tue, Jun 8 2010 3:04 PM	23	70
Help Wanted	Executive Director... by [User] Mon, Jun 28 2010 11:48 AM	260	302

HFHI

Forums	Last Post	Threads	Posts
...	Re: Home Depot ... by [User]

Shortcuts

- [Posts you have not read](#)
- [Forum Subscriptions](#)

Popular Tags

"family support" "family support operations manual" **advertising**
americorps cars for homes
Construction
Construction Tips and Helps **family selection** Family
Services **family support fundraising**
Homeowner education homeowners
marketing
Mortgages New Board
Chairs **ReStore**
ReStores safety Software
Sweat Equity training
volunteer

Pictured: MH has a fully featured discussion forum to keep the dialogue open with site users. It has open forums, employee-only forums, and specialized forums exclusive to specific audiences, such as affiliate executive directors, national office directors, and so on.

Habitat for Humanity®
My.Habitat 2.0 BETA

Allen Wellenstein (Logout | Admin)
Profile/Preferences | Region: US ▾

HOME INSITE KNOWLEDGE CENTER FORUMS STORE CALENDAR

Feedback | Help Search Go!

Welcome to My.Habitat 2.0 You are currently viewing My.Habitat 2.0 beta. [Return to My.Habitat 1.0](#)

Feedback Form
Have a question or feedback on this resource?

☒ I have a suggestion on how to improve this resource
☐ I have a Question on this resource

To: US Resource Development
From: Allen Wellenstein
Re: [\[g2e9f4\]](#) How can planned giving "legacy donors" be recognized?

Comment/Question

How may we contact you? ☒ Email Address
☐ Phone Number

Cancel Submit

Pictured: HFHI team members employ a strategy of continuous quality improvement, actively solicit feedback, and regularly push updates that address user input. To that end, they've included a feedback link as part of the global navigation. In addition, every single system resource has a question/feedback link. Questions are automatically routed to a centralized support center and feedback is routed to the group that published the particular resource. In the example shown here, the feedback is being routed to the US Resource Development team.

CONTENT AND CONTENT MANAGEMENT

Establishing Responsibility

The sponsors of the MH 2.0 project established guiding principles, roles, and responsibilities for publishing content. These are codified in the MH 2.0 *Publishers' Guide* and conveyed during one-on-one training and support sessions. According to Master Librarian Bob Norris, two key objectives drive the publishing process:

- **Establish ownership** for each resource
- **Manage user expectations** regarding the nature of the resources, such as clearly differentiation between formal policy, recommended best practices, and exemplars contributed from affiliated organizations

Publishers

The first key feature of MH publishing is that it's open to all comers.

"Literally, anyone with the requisite expertise (and necessary permissions) can contribute to content development through our collaborative processes," says Hancock. "There are prescribed resource development processes, editing and review cycles, approval for publishing, and lifecycle maintenance. These processes are differentiated depending on the type of resource — for instance, a legal advisory has a different level of oversight than an informational brief."

There are four formal publishing roles; close to 100 people are assigned to these roles, which entail explicit publishing permissions. Each role/person has both a topical and regional scope. In addition, the site technology segregates content into three distinct knowledge bases:


1. **InSite** contains employee content, such as the HFHI travel policy
2. **Knowledge Center** contains vetted content, such as the *Affiliate Operations Manual for Construction*

The publishing process for *Knowledge Center* and InSite relies on a human network of publishers, each of whom is formally designated, trained, and supported.

3. **Samples knowledge base:** This knowledgebase contains content contributed by affiliated organizations, such as a real-world donor solicitation letter

The *Samples* knowledge base content-collection process is purposefully inclusive to encourage contributions. "Exemplars are solicited from affiliated organizations and contributions acknowledged with appreciation," says Lisa Reitz, Senior Director Learning and Knowledge Systems. "However, to ensure quality, users cannot self-publish." Topical experts review each contribution, and those that the reviewers feel do not satisfy minimum quality standards are culled.


"Samples resources are extremely popular," she says. "And user surveys indicate that users are pleased with their availability and usefulness."



[Allen Wellenstein](#) ([Logout](#) | [Admin](#))
[Profile/Preferences](#) | [Region: US](#)

[HOME](#)
[INSITE](#)
[KNOWLEDGE CENTER](#)
[FORUMS](#)
[STORE](#)
[CALENDAR](#)

[Feedback](#) | [Help](#)


Samples Database

[Samples Database](#)
[Question/Feedback on the Samples Database](#)

Browse Samples

Topics
[Fundraising \(1482\)](#)
[Operations & Governance \(1018\)](#)
[Awareness Raising \(1006\)](#)
[Volunteer Engagement \(605\)](#)
[Family Services \(387\)](#)
[Temp Ignore \(332\)](#)
[Construction \(327\)](#)
[Community Development and Partnerships \(256\)](#)
[Housing Finance \(76\)](#)
[Advocacy \(49\)](#)
[Disaster Response \(36\)](#)
[Spanish Sample \(35\)](#)
[State Support Organization \(6\)](#)

Languages
[English \(3141\)](#)

Organization Sizes
[Neighborhood Builders \(10-20 houses per year\) \(885\)](#)
[Community Builders \(21+ houses per year\) \(695\)](#)
[Block Builders \(5-9 houses per year\) \(406\)](#)
[Home Builders \(3-4 houses per year\) \(382\)](#)
[Foundation Builders \(1-2 houses per year\) \(287\)](#)
[No House Numbers on File \(83\)](#)

Regions
[Southeast \(656\)](#)
[Great Lakes of Midwest \(542\)](#)
[Mid-Atlantic \(312\)](#)
[Deep South \(311\)](#)
[Pacific States \(305\)](#)
[Southwest \(104\)](#)

Welcome to the Samples Database

Learn from the real-world best practices of Habitat for Humanity affiliated organizations. Search the sample collection by topic and/or capacity size. The archived resources include strategic plans, annual reports, sponsorship packets, homeowner recruitment posters, budget reports, store advertisements, family selection checklists, capital campaign brochures, volunteer orientation presentations, job descriptions, administrative manuals, and inspiration on every aspect of nonprofit management.

Submit Your Sample

If you would like to submit your affiliate's Best Practice samples, please attach them to an email message with your name, affiliate location and e-mail address. Send to affiliatesamples@habitat.org

Frequently Asked Questions


Are the resources in the Samples database reviewed by HFH?

Who do I contact if I have a question on one of the Samples?

How do I submit my material to be included in the Samples database?

[More FAQs](#)


Latest Samples



[A Brush With Kindness: Orientation Session PowerPoint - includes Repayment Plan](#) **New!**
Organization: Austin HFH

PowerPoint presentation used during the applicant orientation session for A Brush With Kindness. Covers city grant restrictions, selection criteria, five-year mechanic's lien, repayment plan for portion of project costs based on income and expenses, legal regulations, possible work projects, and before-and-after photograph.


Published: 6/29/2010 | [More](#)



[Newsletter "On Location" Summer 2010](#) **New!**
Organization: Goldsboro-Wayne, Inc. HFH of

Full-color four-page newsletter for Summer 2010. Cover article features a Director's Corner message about "Writing the Vision, Making It Plain." Content includes a partner spotlight, help-wanted list, "We've on the Move" feature with accomplishments during recent months, thank-you list, volunteer spotlight, and leadership team list.


Published: 8/24/2010 | [More](#)



[Critical Home Repair Application](#)
Organization: Charlotte, HFH of

A one page intake and application form for home repair projects. Has the fair housing logo and statement.

Published: 12/19/2009 | [More](#)



[Post-Event Report on Revenue and Logistics for Wine Tasting Silent Auction](#)
Organization: Millstone Basin Area HFH

Detailed spreadsheet with comprehensive post-event report on revenue and logistics for a Wine Tasting & Auction fundraising

Pictured: The front page of the *Samples* knowledge base. This knowledge base contains content contributed by affiliated organizations, such as a real-world donor solicitation letter.

Publishing Roles

Content ownership is established by classifying resources into one of 20 categories, each of which is managed by a Publishing Group Owner (PGO). Each category has multiple topics and a regional scope. Along with ownership comes the responsibility for maintenance.

For formally published resources, such as operations manuals, the editorial workflow is managed by the organization's Communications Department and professional editors edit the content. For less formal resources, editing is coordinated at the department level.

What follows is a breakdown of some of the site's publishing roles:

PGOs: The PGO has significant authority and responsibility to establish publishing policy and provide guidance regarding priorities, vetting, and approval for the topics under their purview. PGOs are typically senior directors (one level below VP).

Topic Managers: At their discretion, PGOs can designate topic managers to assume authority similar to their own. For example, the Construction PGO has designated a Topic Manager for Sustainable Building (Green) practices. Topic managers are usually company directors.

Site Contributors: Site contributors assist PGOs and topic managers with data entry tasks. Site contributors are usually specialists.

Forum Moderators: Forum moderators monitor and facilitate online discussions. Forum moderators are usually managers.

All four roles — PGO, topic manager, site contributor, and forum moderator — are duties formally designated in each person's job plan and training is required before permissions are granted. Personnel are selected for these roles based on their topical expertise and attention to detail.

Open Feedback

Any user can provide feedback on any resource via MH's form-based feedback system. When this happens, the PGO receives an email notification and takes action on the feedback via the MH *Feedback Manager*. This action might include responding directly to the comment or assigning it to a topic manager. The *Feedback Manager* tracks feedback activities and logs responses.

Although the *Feedback Manager* was created to elicit feedback from users on their experience using MH, a secondary use was discovered that has significantly enhanced publisher collaboration. Publishers who are perusing MH and decide that they'd like something changed about a resource they don't own — such as a change in metadata — simply make the request on the spot using the feedback link, which in turn sends an email notification to the appropriate PGO and the MH Operations Team.

"This convenience has led to publishers spending more time browsing MH in that they can accomplish a great deal without having to log in to the administrative interface," says Norris, "And this, in turn, has resulted in an increase in the quality of the resources and their associated metadata."

Another helpful use of the *Feedback* system occurs when a user complains about not being able to find something.

"It can be very difficult for those of us who work with My.Habitat daily to perceive navigational challenges," he says. "When a user vents frustration, not only can we respond directly and help solve the problem, but we are spurred to analyze what led to the problem and correct it."

"In so doing, we have converted many a user from being frustrated to being an advocate, some of whom go on to enthusiastically contribute their time to help us improve the system."

In addition to gathering feedback through site mechanisms, the organization conducts an annual survey to solicit opinions about MH and key resources. This information is conveyed back to site contributors.

Ensuring Quality

The Communications Department prescribes style guides for various types of site resources, and publishers typically use templates for their content.

The MH 2.0 Operations Team shares best practices via computer-based training (using Microsoft Live Meeting), the *MH Publishers' Guide*, and the MH publishers' SharePoint-based team site. Training is always contextualized to a publisher's own content, and training is a prerequisite for permissioning. Follow-up support sessions are scheduled to help the publisher apply new knowledge to solve real-world problems. On-demand support is also available.

Formal publications are reviewed often. For less formal publications, the PGOs are responsible for assuring that any resource published under their purview meet the guiding principles set by senior leadership and for providing explicit guidance about their criteria to those who have permission to publish.

Post-publication, anyone can surface a potential problem such as a typo, broken link, or out-of-date reference via the *MH Feedback* system.

The Affiliate Support Center collects and conveys US and Canadian user feedback on MH resources. And PGOs monitor resources tagged with their topics for compliance with their guidance. The Communications Department oversees news releases and monitors style-guide-compliance of published resources.

The MH Operations Team can communicate with select publishers by group, using the site's notification feature. And per the Digital Publishing Process, project subsites are created on the publishers' team site to foster collaboration in creating, revising, or updating major site resources. Using SharePoint's version control and permissioning, a working copy of the document is maintained and backed-up.

"This mitigates the problems that arise during collaborative writing projects when versioning is left uncontrolled," says Hancock. "It is also quite helpful to collaborators to be able to access their files from a browser."

Once a resource has completed the editing and formatting phases, it's typically engineered for publication with internal navigation links and links to ancillary resources. A proof version is reviewed and tested online by stakeholders before it is approved by the PGO for publishing on MH.

When publishing is imminent, the Communications Department develops a communications plan for notifying constituents and the Affiliate Support Call Center is briefed. Feedback from users is elicited and captured via the Call Center and MH's *Feedback Manager*. Miscellaneous items are tracked via a document maintained on the project subsite. Source files are archived and a review date is calendared.

My.Habitat Publishers' Site

Welcome HFHI\jawsystems

Habitat for Humanity® My.Habitat Publishers' Site This Site: My.Habitat Publisher

Home | Family Support AOM | Financial Policies & Procedures AOM | NNG Submission | Site Actions

View All Site Content

Documents

Publishing Resource Library

Lists

My.Habitat Top-Level Topic Categories

MH Operations Team

Useful Links

Discussions

Sites

Family Support AOM

Financial Policies & Procedures AOM

NNG Submission

People and Groups

Recycle Bin

Resources for My.Habitat Publishing Group Owners (PGOs) and Topic Managers

Welcome to the My.Habitat Publishers' Team Site

Greetings! This TeamSite contains useful information and resources for those who publish via My.Habitat including: A list of Publishing Group Owners and their categories; A document library (link at left); and links to the current versions of the My.Habitat Publishers' Guide and Master Tag list (links on right). This site will also be used to coordinate major publishing projects like AOMs.

Please contact Bob Norris with suggestions, questions, and/or feedback or to request that a colleague be given access to the site: BNorris@Habitat.org

My.Habitat Top-Level Topic Categories

Topic	PGO
Advocacy	Jose Quinonez
Awareness Raising	Jill Clafin
Community Development and Partnerships	Stephen Seidel
Construction	Jack Blanchette
Disaster Response	Kip Scheidler
Family Services	Carol Gregory
Fundraising	Lysa Ratliff (Danielle Turnage)
Housing Finance	Patrick Kelly
Operations and Governance	Lisa Reitz
ReStore	Frank Reed
Volunteer Engagement	Desiree Adaway
InSite - Facilities	Lyn Jensen
InSite - Human Resources	Iva Eden
InSite - Marketing & Communications	Jill Clafin
InSite - Travel	Gene Valde
Legal	Hilary Harp
InSite - Finance	TBA
InSite - Governance, Risk & Compliance	TBA
InSite - Purchasing	TBA
InSite - Information Technology	TBA

Useful Links

- Publishers' Guide (Most Current Version)
- Handy Character Counter for Description Field
- Link to MH 2.0 Admin Tools to access your publishing sites
- HFHI SharePoint TeamSite Support - Lots of Useful Resources for SharePoint Users
- HFHI SharePoint Users Guide - Extensive Guidance on Using SharePoint
- Master Topic Tag List in Excel (Current List)

Add new link

MH Operations Team

Name	First Name	Business Phone	E-mail Address
Bob Norris			BNorris@Habitat.org
Drew Hancock			DHancock@Habitat.org
Lisa Reitz			LReitz@Habitat.org
Tony Chan			TChan@Habitat.org

Add new item

Pictured: An example of a team site area.

Solving Problems

The HFHI team faced many challenges in taking on this redesign project. But, in every case, they also found a reasonable solution to address the challenges. What follows is a breakdown of the major challenges and how the HFHI team chose to address them:

- **Challenge: Lack of Funding**

HFHI did not have the discretionary funds to invest in the rapid deployment of a costly enterprise knowledge management solution. Nor did HFHI have the capacity to hire or reassign staff to full-time roles to support a quality control program.

Solution: *Institute a multi-year, phased approach for technology development.* The MH Steering Committee established priorities, which were funded annually as budget permitted; some especially motivated departments funded special projects out of their discretionary funds. For staffing, existing personnel were nominated as candidates for publishing roles and those selected were assigned the role as a collateral duty. A small operations team was established to support publishers.

- **Challenge: Cross-Department and Regional Topic Stakeholders**

In many cases, a given topic has stakeholders in more than one department, each of whom has a vital interest in what is published.

"This is particularly challenging when policy is involved," says Hancock. "For example, a policy related to minors working on a construction site has ramifications that concern the interests of Legal, Construction, and Volunteer Management, as well as the five area offices — each of which may have regionally specific requirements."

Previous iterations of MH were heavily US-centric, and senior leaders were determined to internationalize MH 2.0.

Solution: *Establish top-level content categories and the PGO role.* Senior leaders defined the categories with an international perspective and PGOs were given global authority. To ensure inclusiveness, PGOs are encouraged to select topic managers from other departments and regions. Issues of concern are deconflicted by the Operations and Governance PGO who hosts regular meetings.

- **Challenge: Oversight**

Complicating the ownership picture at HFHI is the need for rigorous oversight on certain topics by entities such as Internal Control, Risk Prevention and Response Unit, Legal, and one or more VPs. However, it was recognized that establishing a rigid quality control process that applied to all topics alike would inhibit publication of helpful resources.

Solution: *Establish a formal digital publishing process.* The process applies to key resources, such as manuals and policies, and restricts the use of select tags, such as *HFHI Policy* and *Legal Advisory*. This process defines the guidelines, participants, and steps for assessing requirements, designing the resource, collaborating, reviewing, engineering, publishing, controlling quality, and ensuring maintenance. SharePoint-based team sites and Microsoft LiveMeeting technologies support these efforts. The MH Operations Team coordinates the process.

- **Challenge: Content Maintenance**

Once published, a resource must be maintained. Although the sites' guiding principles dictate that content must be maintained, actually doing this can be difficult.

Solution: *Include formal steps for archiving source material, tracking feedback and/or errata, and conducting calendared reviews in the digital publishing process.* These activities are supported by the MH Librarian; for example, source files are archived with SharePoint version control and limited permissions. For resources created and published less formally, the onus is on the PGO to manage the content.

"Hence, the fundamental concept of our quality control program is that the decision to publish a resource equates to owning that resource, and ownership begets the responsibility to manage it," says Hancock. "Recognition of this burden of ownership is key to effective quality control. It also helps mitigate lengthy disagreements over ownership."

- **Challenge: Supporting Part-Time Publishers**

While PGOs hold the ultimate responsibility for all content published in their topic area. In practice, the management of that content often falls to a more distributed team of people, some of whom are invested only as part-time content contributors.

"Conceptually, PGOs are ultimately responsible for anything published on InSite or via the *Knowledge Center* that addresses a topic under their purview," says Norris. "In practice, the PGOs have flexibility in how they choose to manage their categories."

At one extreme is the PGO who oversees every publishing decision and closely monitors any item labeled with one of his or her topics. At the other extreme is the PGO who delegates almost all decision-making to topic managers. Most PGOs select several topics for self-management and assign others to topic managers. Such disparity poses a challenge for the organization.

"In our experience, publishing activity tends to happen in bursts rather than as a sustained effort," says Reitz. "These bursts are typically associated with departmentally supported events, and publishing markedly subsides as workload spikes. From a support perspective, this results in some inefficiency."

Although the management team conducts a requirements assessment and helps the PGO craft a publishing strategy and train personnel, often this must all be repeated after a publishing resource steps back into the publishing cycle after a workload-induced delay.

So, while the publishers are trained, the gaps between training and execution often mean that they:

1. Forget how to use some of the publishing tools
2. Lose their grasp on nuanced aspects of describing and labeling resources (meta-data)
3. Forget best practices and labor-saving techniques

Personnel turnover is also problematic, especially at the topic-manager-level.

Solution: *A three-pronged approach.* Given HFHI's unique situation, the following three-part approach seems to work best:

1. **Provide specific training.** To some extent, the solution to this problem is the creation of a curriculum supported by reusable training resources. To that end, the team has standardized the orientation and created instructions for routine tasks, such as annotating screen shots. However, the nature of content organization and creating useful meta-data is complex and can be highly resource-specific. Therefore, it's important to account for both the audience and the subject matter; for example, the jargon and utility of construction-related resources is much different than what's useful to an accountant. The organization must also tend to a wide spectrum of user expertise and familiarity with our programs.
2. **Establish best practices.** "Of course, we identify and promote best practices," says Norris. "For example, spelling out acronyms in a meta-data field so that the search index contains both the acronym and the full term. We also tactfully point out practices that are likely to lead to problems."
3. **Meet unique needs individually.** "It strikes me that though there are best (and less than good) practices that can be shared across topics — there are many topic-specific elements that require tailored support and problem solving," says Norris. "As a result, much of our effort is focused on helping publishers meet the unique needs of a select audience, and these solutions are often not broadly applicable."

"If we were dealing with personnel dedicated to these tasks on a full-time basis, this distinction would not be as constrictive," says Hancock. "But when the publisher is working part-time — often less than 20 percent — there is significant pressure to limit the scope of what we teach to that which is most immediately useful to the tasks at hand."

TECHNOLOGY BEHIND MY.HABITAT	
Category	Technology Used
Web Server Hardware and O/S	<ul style="list-style-type: none"> Dell PowerEdge servers with Windows 2003
Bug Tracking/Quality Assurance	<ul style="list-style-type: none"> SharePoint
Design Tools	<ul style="list-style-type: none"> Visio for wireframing Photoshop for design
Site Building Tools	<ul style="list-style-type: none"> Microsoft Visual Studio
Content Management Tools	<ul style="list-style-type: none"> Microsoft SharePoint 2007 with the AWS Content Slammer
Search	<ul style="list-style-type: none"> SharePoint search

SEARCH

Curated Search

MH relies on the standard search provided through SharePoint. On top of that, HFHI added a custom layer to provide "curated search," which lets users jump directly to known, curated topic pages via auto-complete functionality. This was done to accommodate different search behaviors among users.


"Users tend to break down into two types," says Wellenstein, "those who use the navigation to find things and those who go right to search."

With curated search, even users who jump right to search get directed to the most relevant, authoritative, and helpful content.

The team maintains the integrity of search results through vigilance.

"We regularly review search logs to make sure that common terms people are searching for are represented in the curated search results with useful, authoritative results," he says. "We can set synonyms, so if someone is typing 'green construction' they get directed to the 'sustainable building' topic in our *Knowledge Center*."


"For terms that are not represented by topic or type tags in our taxonomy — say a particular program name — we can create search pages that return when users enter that name showing the information and links they are most likely looking for."



[Allen Wellenstein](#) (Logout | Admin)
[Profile/Preferences](#) | [Region: US](#)

[HOME](#)
[INSITE](#)
[KNOWLEDGE CENTER](#)
[FORUMS](#)
[STORE](#)
[CALENDAR](#)

[Feedback](#) | [Help](#)



Welcome to My.Habitat 2.0

You are currently viewing My.Habitat 2.0 beta. [Return to My.Habitat 1.0](#)

339 item(s) found for **fund**

House Sponsorship Guide
 An important resource to determine responsibilities between Chapters and Affiliates in a house sponsorship.
<http://my2.habitat.org/download/q325b9/House-Sponsorship-Guide> - 05/03/2010

HFHI - Haiti Earthquake Response: Update 1/19/2010
 Ricky Martin Foundation/Habitat for Humanity Haiti Recovery Fund "Together, we need to protect the children and families displaced by the earthquake in Haiti. Please donate now to the RMF/HFH Haiti fund and help us keep the children safe." —Ricky Martin Ricky Martin traveled to Port-au-Prince on January 19 with Habitat for Humanity International's chief executive officer, Jonathan Reckford, to visit one of the earthquake-ravaged neighborhoods in the capital city. Martin was moved...
<http://my2.habitat.org/news/q31ea5/HFHI---Haiti-Earthquake-Response-Update-1-19-2010> - 01/26/2010

Resource Development AOM (2009)
 Annual Fund, Direct Mail, Capital Campaign, Major Gift, Special Events, Planned Giving an
<http://my2.habitat.org/pages/q31584/Resource-Development-AOM-2009> - 03/26/2010

They say she can afford the house, but I say she can't? Who's right?" Determining Ability to Pay (66 minutes)
 Recorded on May 10, 2007. Length: 66 minutes. ** SCROLL DOWN: There are two ways to play most recordings. Either click the "listen" button. Or scroll down to the attachments, right-click the audio recording file to save-target-as, download to your computer, and play from there. Some recordings also have an attached "speedy" version that plays back at faster speed (with voices talking fast), which shortens the time required for listening...
<http://my2.habitat.org/event/23021/They-say-she-can-afford-the-house-but-i-say-she-cant-Whos-right-Determining-Ability-to-Pay-66-minutes> - 04/19/2010

Affiliate/Media Relations
 There are two ways to play most recordings. Either click the "listen" button. Or scroll down to the attachments, right-click the audio recording file to save-target-as, download to your computer, and play from there. Some recordings also have an attached "speedy" version that plays back at faster speed (with voices talking fast), which shortens the time required for listening. Learn...
<http://my2.habitat.org/event/39720/Affiliate/Media-Relations> - 04/07/2010

Report on Repair and Rehab Survey of Habitat for Humanity Affiliates (32 minute podcast)
 The Neighborhood Revitalization Initiative encourages Habitat affiliates to offer a broad array of housing solutions: repairs, weatherization, rehabs, green new home construction. The report featured in this podcast is an initial attempt to mine knowledge from thirty representative affiliates about creating repair or rehab programs or improving existing programs. The podcast focuses on how how affiliates responded to questions about starting their repair/rehab programs, identifying projects, selecting families, handling...
<http://my2.habitat.org/event/q32ac5/Report-on-Repair-and-Rehab-Survey-of-Habitat-for-Humanity-Affiliates-32-minute-podcast> - 07/07/2010

Marketing & Public Relations: featuring Bucks County affiliate in Pennsylvania
 "Marketing & Public Relations." Recorded on February 17, 2006. ** SCROLL DOWN to see handout attachments. There are two ways to play most recordings. Either click the "listen" button. Or scroll down to the attachments, right-click the audio recording file to save-target-as, download to your computer, and play from there. The Bucks County affiliate in

Pictured: An example of a search results page.

MEASURING SUCCESS

Often, the best way to figure out if you've succeeded is to look at what your goals were when you started. For HFHI's redesign project, the following table provides an at-at-glance view of the project's goals and outcomes:

GOAL VS. OUTCOME	
Goal	Outcome
<i>Improve ease of use and access for users</i>	<ul style="list-style-type: none"> Approximately 60 percent drop in "where do I find...?" questions. The updated user profile and preferences has provided much easier user profile management, thus decreasing significantly support

	requests for things such as email address and password changes.
<i>Highlight the HFHI recommended/vetted approach so that affiliates can quickly find key information</i>	<ul style="list-style-type: none"> • Improvements to the affiliate Samples Database in the US and increasingly in regions across the globe. • Improvements in integrated learning and knowledge-sharing strategies, such as the Affiliate Support Center accessing information to respond to call center questions, conference calls reinforcing use of affiliate samples, and workshop training sessions. • Regional preference options that make finding locally relevant information easier and faster. • Affiliate Operations Manuals and other resources that provide Habitat's recommended approach and link users to multiple external sites/resources that are essential for their work.
<i>Enhance the ability to report on usage, satisfaction, and other key indicators</i>	<ul style="list-style-type: none"> • InSite updates are now more timely.
<i>Increase the number of tools and resources available worldwide</i>	<ul style="list-style-type: none"> • More content is now offered that doesn't depend on one person traveling across the globe. For example, face-to-face training isn't required to increase knowledge sharing. • Engagement of nearly 150 people in HFHI with shared accountability for high-quality content.
<i>Use reliable processes to ensure that information can be updated as fast as conditions, regulations, and other things that impact our work</i>	<ul style="list-style-type: none"> • Reduction of the "hassle factor" for users in posting and finding information, including better content organization.
<i>Build commitment for achieving and maintaining high-quality solutions through engagement of a cross-functional team of</i>	<ul style="list-style-type: none"> • The ability to use multiple indicators to measure factors such as usage and satisfaction so that the team can easily adapt its approach and

<i>sponsors, publishers, and content contributors</i>	continue to meet and exceed user expectations.
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Quality vs. Quantity

Reducing the amount of content on a site seems like an unusual measure of success, but for HFHI it was.

"Decreased content, believe it or not, is a significant measure of success for us," says Hancock. "The initial extranet and intranet were described as 'Grandma's Attic.' There was a lot of useful information within, but incredibly difficult to find due to such a large amount of outdated and abstract content surrounding it."

"Once we got a handle on the publishing and created quality control processes, we saw a significant decrease in content, which in our case was a really good thing. The useful information surfaced much quicker for the user and therefore increased the success of the user's visit."

LESSONS LEARNED AND BEST PRACTICES

HFHI team members outline some of the best practices they learned along the way:

- The management of content and the consumption of content are two completely different concepts.** "Much of the content was organized for viewing in a way that matched the structure of the organizational chart. Although it was easy to identify who owned the content, it wasn't always so simple for the user to find the content without in-depth knowledge of our departmental responsibilities. MH 2.0 separates the ownership of content from how it's browsed. SharePoint is still used as the CMS — each department or program has a 'publishing site' where they publish their news, FAQs, downloads, events, podcasts, etc., and tag them by topic and type of content. Users then browse content based on topic or content type rather than needing to find the SharePoint site where that content lives." (Wellenstein)
- Separate the content navigation from the ownership.** "Try to resist the temptation to organize the navigation based on the organizational chart. Organize via topics and types of content that the general end user will be familiar with right out of the gate." (Norris)

National Geographic Society (2014)

Using the intranet: National Geographic Society is one of the largest non-profit scientific institutions in the world. It reaches 450 million people worldwide each month through its media, exhibitions, live events, school publishing programs, research grants, and merchandise.

Headquarters: Washington, D.C.

Number of employees the intranet supports: Approximately 1,500 full-time employees, along with numerous contractors, interns, and international partners.

Locations where people use the intranet: Washington, D.C., New York, Los Angeles, Detroit, Colorado, Chicago, London, Sweden and China

Design team: A three-person Internal Communications team led National Geographic's intranet redesign, working with Celerity's web and mobile team and the Baker Hill design agency. The team engaged stakeholders from every department across National Geographic for the initial launch and to establish a regular group of contributors.

In-house team: Keelin Vaccaro, Director of Internal Communications; Megan Seldon, Manager of Internal Communications; Christy Solberg, Visual Communications Coordinator; Russ Little, Director, Technology; Dan Backer, Director, Infrastructure

Celerity: Elisabeth Beller, Project Advisor; Drew Engelson, Technical Advisor; Susana Esparza, Scrum Master and Project Manager; John Dymond, Architect and Lead Developer; Jason Kolaitis, Lead User Experience Designer; Beshoy Louka, Front-End Developer; Ilya Lemberg, Developer; Kenneth Yu, Developer

Baker Hill: Mark Hill, Principal and Creative Director

SUMMARY

Faced with an outdated intranet and armed with data from an engagement survey of employees, the National Geographic intranet team knew employees wanted more communication and collaboration. Based on the existing survey results and more than 100 face-to-face interviews with employees, the vision for the new site, *ngconnect*, became clear: connect employees to the organization, each other, and the tools they need to do their jobs.

The team wanted to achieve these goals while reflecting a sense of the organization and its history. It was essential to the Internal Communications team that the new site reflects the DNA of the nonprofit scientific institution, with a focus on exploration and adventure, visually stunning photography, and unique storytelling.

The team, together with business acceleration consultancy Celerity and design agency Baker Hill, approached the redesign using an Agile methodology. User research played a big role in the project, with focus groups, card sorting, and user testing of prototypes, as well as continued user feedback through the review process, which occurred every two weeks.

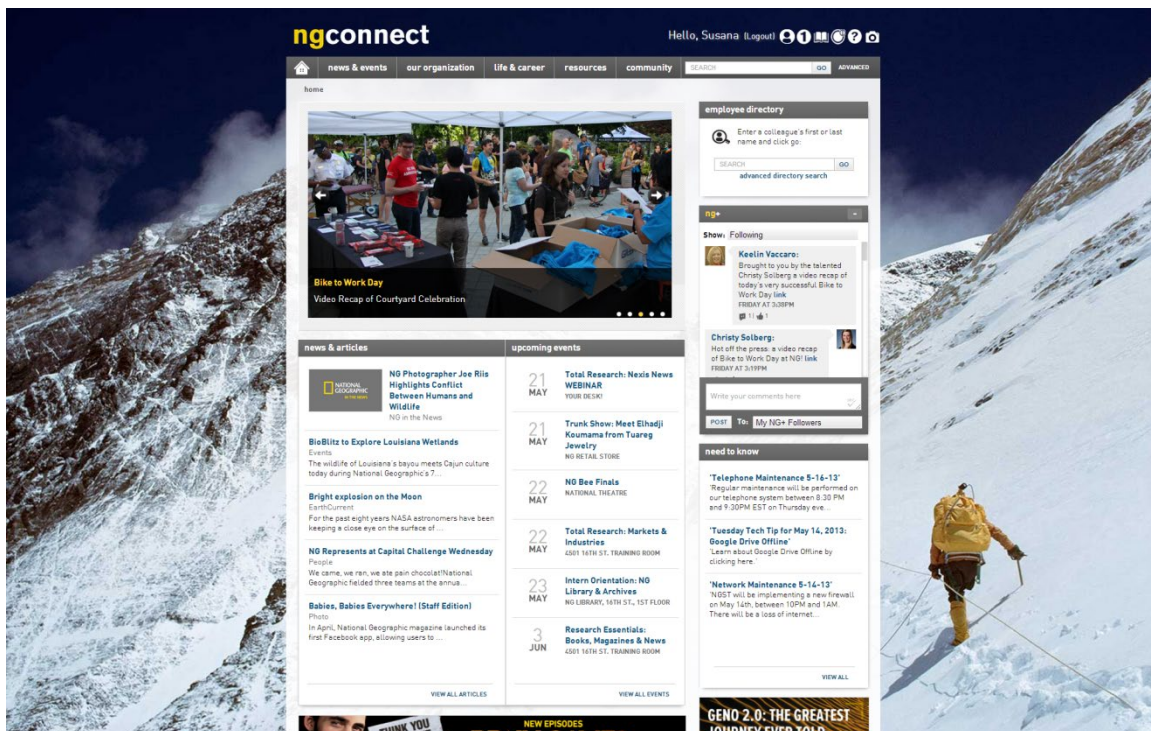
The homepage uses a carousel to highlight five news items daily. Users can page through items using arrows on the side of the carousel. News and articles are also listed beneath the carousel. Each headline is accompanied by a category (such as *Events*) or source (such as *EarthCurrent*) and part of the story's first line. Upcoming events are listed with the event name and location. Each piece of content allows users to comment on or "like" it, creating an opportunity for dialogue.

The *Employee Directory* appears in the top corner of the page. Users can enter an employee's first or last name or do an *Advanced Directory Search*. A feed from the site's custom-built social tool, *ng+*, is listed beneath, showing employee information from those they are following. Employees can comment on items directly from the

feed and select which groups should see the comment (such as posting to all followers or only certain groups).

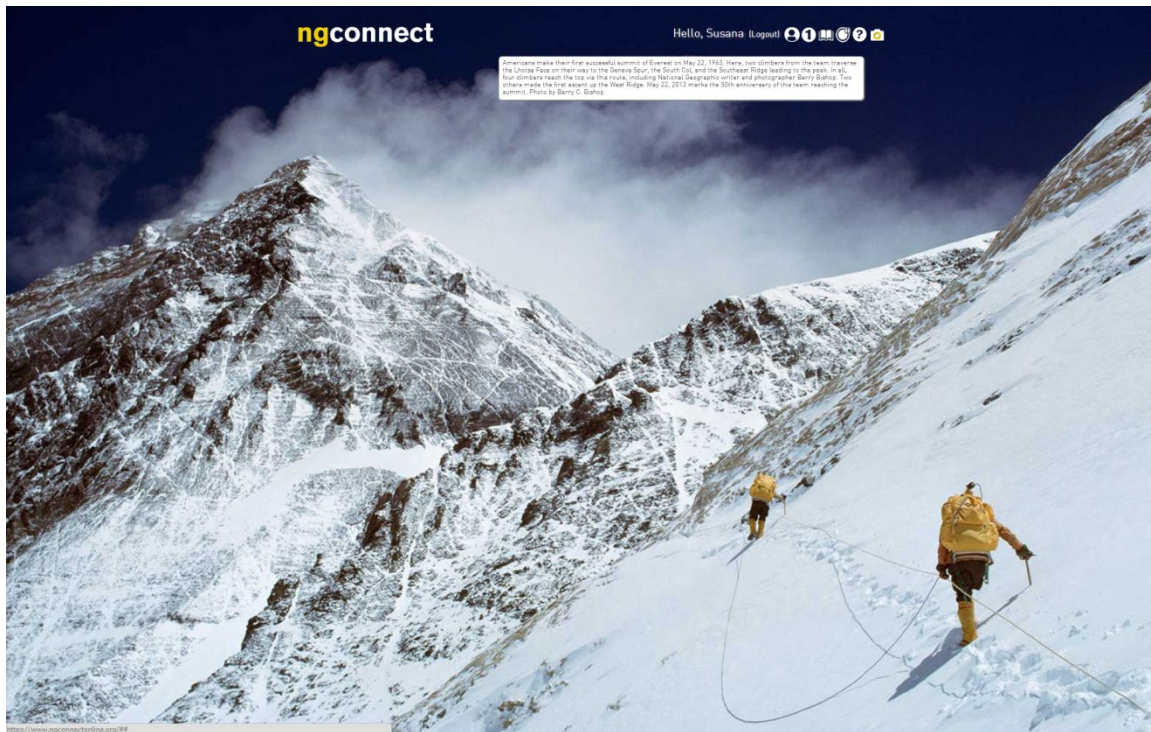
The homepage also includes several other features: the *Need to Know* section has important operational content, such as maintenance work and technology tips; promotional banners advertise upcoming National Geographic programming or employee events; and the *Most Popular* content menu displays how many users have either viewed or “liked” a piece of content.

Icons at the top of the screen give users quick access to notifications, their employee profile, Portal 1, the library, Okta, SSO, help, and also background image information. These links are available throughout the site.



Pictured: The homepage highlights news, events, and updates. Users also have quick access to the *Employee Directory* and ng+, the site’s social tool.

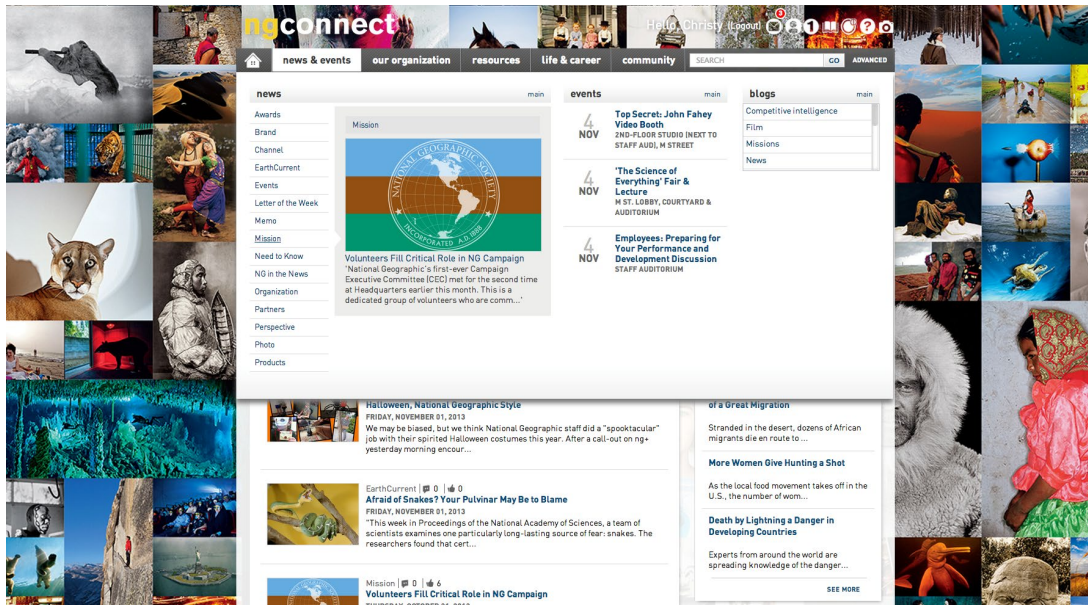
The site uses a big image background, drawing on its rich history as a scientific institution with incredible photography. The images, which change monthly, are chosen to reflect current events or significant milestones in the organization’s 125-year history. Users can “close” the content of the site to reveal the full screen image, complete with a caption, by clicking on the camera icon in page’s the upper right-hand corner.



Pictured: National Geographic’s expansive and impressive photo library is put to good use on the site. Images act as a backdrop to the site, and users can click the camera icon in the upper right-hand corner to see the full photograph and its caption. The image above shows the first successful summit of Mount Everest by Americans in 1963.

To help users navigate the site, megamenus provide quick access to information. The previous site structure had grown unmanageable over the years. The team used card-sorting exercises to create navigational categories, but user testing was essential to creating the final design. In testing on prototypes, the team found that users had a hard time using the large menus, becoming overwhelmed by the number of choices. The users also had issues with the timing of the hover states on the menus: users were accidentally triggering them, and then finding them hard to close. The team used these testing results to streamline the options presented to users and to change the timing to improve performance.

The menus list subsections within categories as well as highlighting pieces of content. For instance, the *News and Events* menu highlights key content from each section area, upcoming events, and links to key blogs available on the site.

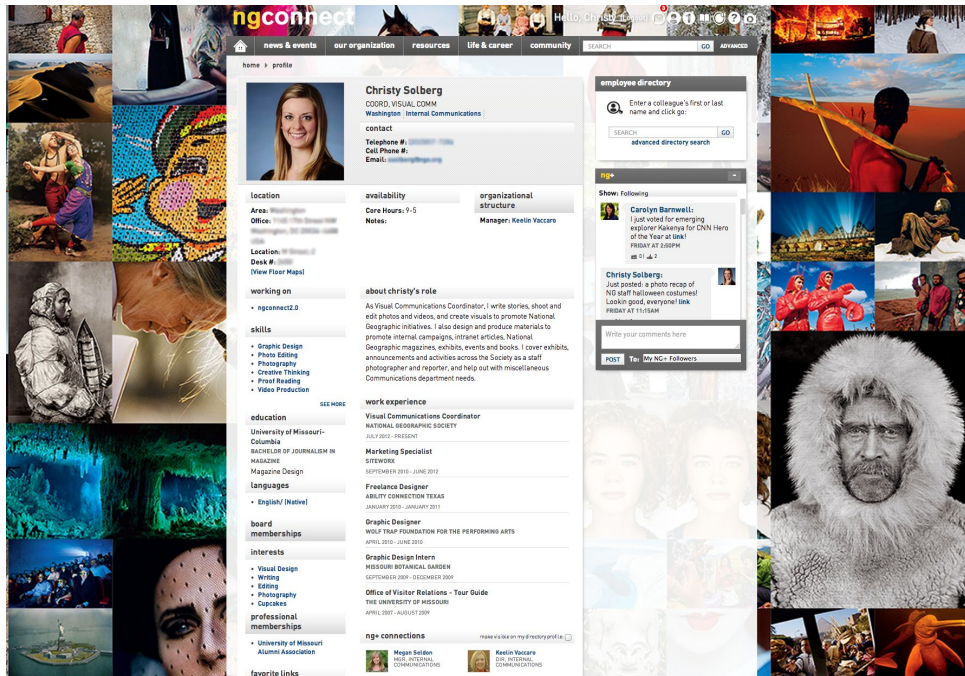


Practice: The site's megamenu list subcategories of content, but also surface important information in each site section. Events and a list of blogs round out the content in the menu. The main image changes depending on the selected news category.

The *Employee Directory* underwent a transformation, with the goals of providing standard contact information as well as helping employees get to know their colleagues by searching shared skill sets or current projects. Profile information includes current projects and connections to other employees. The *Employee Directory* pulls data from two internal systems, but also allows employees to pull in data from their LinkedIn profiles (via an API).

One of the main reasons employee directories often suffer on sites is a lack of employee participation in filling in or maintaining their own data. The team realized this, so use LinkedIn as a shortcut for providing that data. Users can simply log in to their LinkedIn profile and import information into the intranet *Employee Directory*. The team also encouraged employees to upload photos to their profiles by hosting special staff photo days aimed specifically at taking profile photos.

The employee search is highlighted on the site's homepage and is always available via the site search on every page. Users can search for colleagues by name or by keyword, to help people find one another when they have a topic—rather than an individual—in mind.



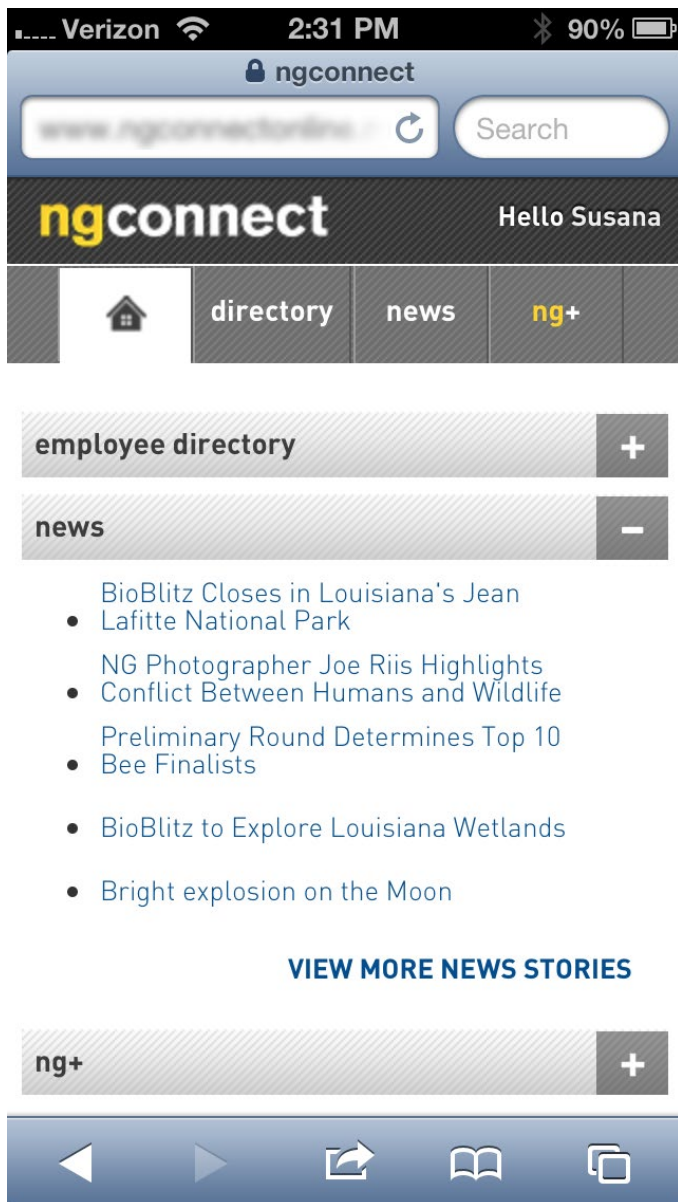
Pictured: Employee profiles list essential contact information at the top, along with key details such as availability and place in the organizational structure. The side of the page lists current projects, skills, education, languages, board memberships, interests, professional memberships, and favorite links. The center of the page allows for a personal statement about the employee's role, a list of past work experience, and, finally, a list of the employee's connections on the site's social network tool.

The greatest stride toward connecting employees was the addition of ng+, a custom-built internal social tool. The ng+ tool combines what the team considered the most useful and relevant elements of four popular social tools: LinkedIn, Twitter, Facebook, and Google+.

With ng+, users can microblog, posting short updates about their day or work; ask questions; and share useful or interesting info with their network. The tool uses a connection approach similar to Twitter, where "following" doesn't have to be mutual. Further, the team recognized the need for some groups—such as Human Resources, The Green Team (sustainability), Technology, and Internal Communications—to be able to broadcast messages; these messages appear in everyone's feed.

One of the ways the team encouraged employee interactions on the new site was to ask senior management to microblog about important meetings, travel, and organizational developments, as well as to use their microblogs to recognize good work and achievements. Employees are often more willing to participate in social areas of intranets when they see senior leaders posting or commenting; such posts indicate that the organization sanctions this new way to communicate.

Currently, about a quarter of employees are actively using ng+ for sharing information or asking questions. More than half of employees have commented or liked a post.



Pictured: The mobile version of the site focuses on three key areas for mobile users: news, the *Employee Directory*, and ng+, the site's social tool. The mobile experience is focused on keeping employees informed (through the news), connected (through ng+) and in touch (via the *Employee Directory*).

With the robust ng+, which is integrated throughout the site and its mobile version, the National Geographic intranet team went beyond a site update to create a tool that supports new methods of communication throughout the organization.

BACKGROUND

The redesign of National Geographic's intranet began with an employee engagement survey conducted in 2009. This survey revealed an overall theme: Staff wanted communication and collaboration across the organization to improve. And, as one of

the main channels for employee communication, the intranet redesign was one of the specific suggestions put forward by staff to help meet this need.

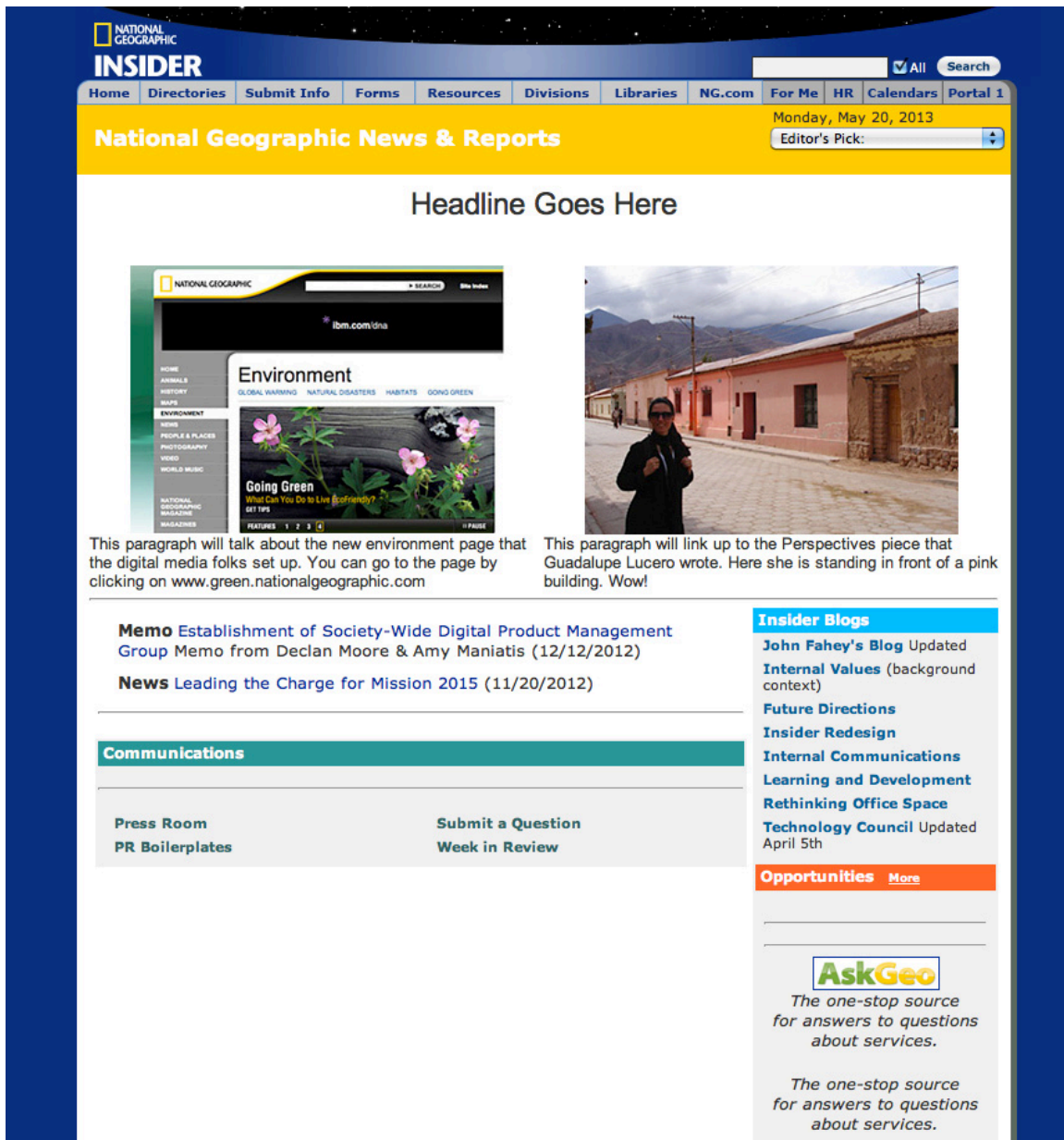
A working group of employee volunteers from across National Geographic then took a deeper look at three issues: what employees wanted to see in a new intranet, best practices across the intranet world, and what resources would be required to develop such an intranet. The working group presented their findings to National Geographic's senior management team, which gave the go-ahead for the redesign and allocated a budget and the necessary resources, including hiring an Internal Communications director to lead the project.

"One of our first steps was to define a core vision for the new intranet," says Keelin Vaccaro, Director, Internal Communications, National Geographic, "which came after reviewing all existing employee research, as well as conducting face-to-face interviews with over 100 employees who represented all areas and levels of the organization.

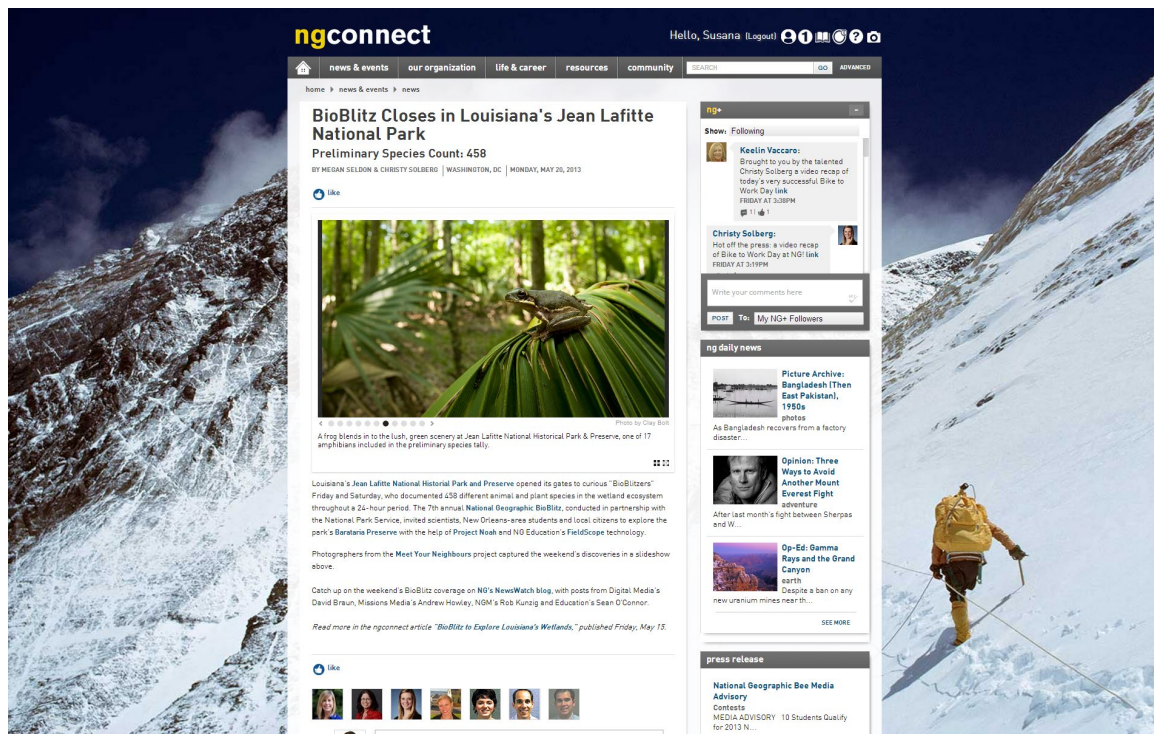
"This was also a great help in beginning to define site requirements," she says.

The vision for the project was clearly defined: "Connect employees to the organization, each other, and the tools they need to do their jobs."

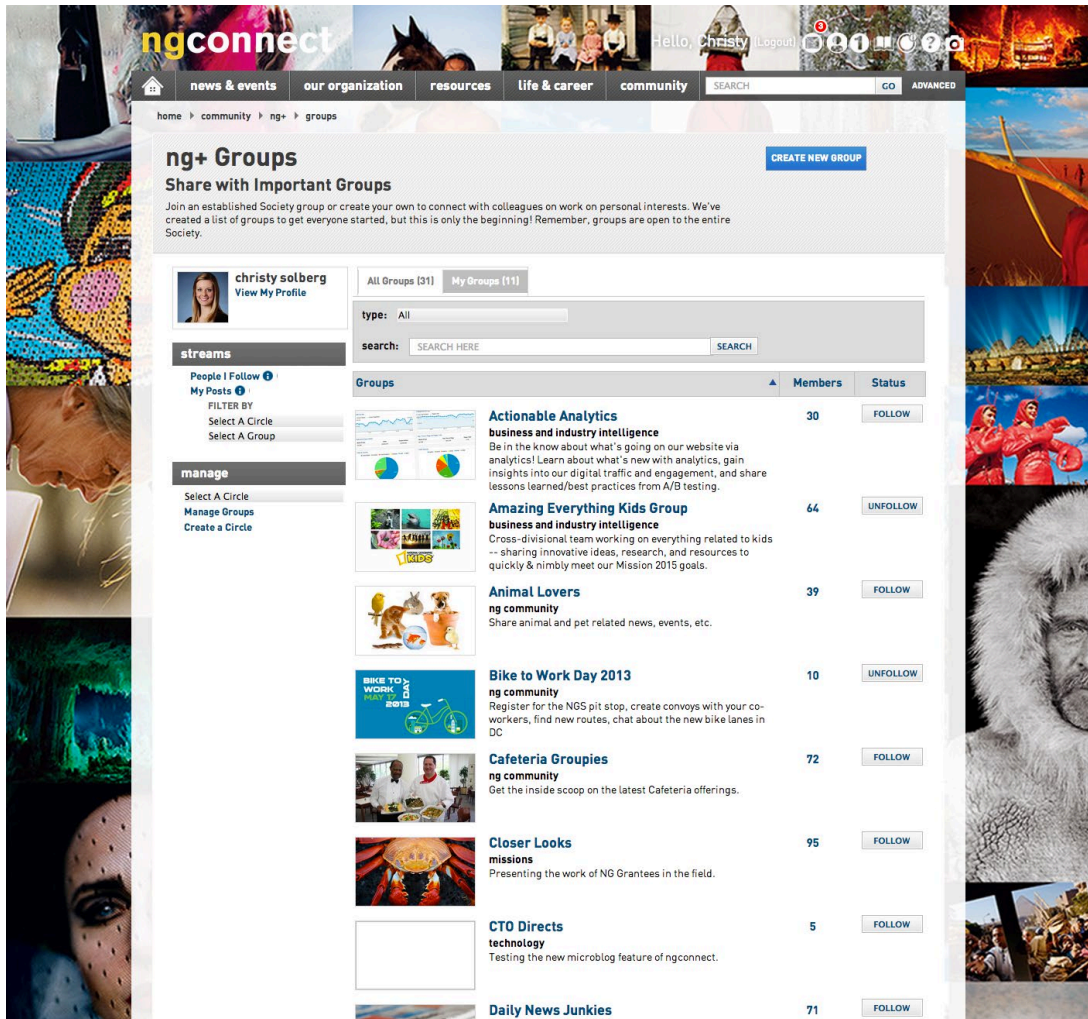
Of equal importance was designing the site so that it conveyed the organization's brand attributes of exploration and adventure through stunning photography and unique storytelling, while also making it intuitive and functional.



Pictured: The old National Geographic intranet design, which was a winner of the NN/g 2007 Annual Intranet Design Award.



Pictured: A sample news story on the redesigned site has an optional image carousel at the top of the page, followed by the article body and opportunities for users to “like” or comment on the article at the bottom of the page.



Pictured: One of the intranet’s social and community-building features is the *Groups* page, where employees are encouraged to create and self-manage various group pages related to their work and outside interests.

INTRANET TEAM



Team members shown here (front row, left to right): Drew Engelson (Celerity), Megan Seldon (National Geographic), Keelin Vaccaro (National Geographic), Christy Solberg (National Geographic), Susana Esparza (Celerity), and Kenneth Yu (Celerity); (back row, left to right): Elisabeth Beller (Celerity), Russ Little (National Geographic), Beshoy Louka (Celerity), Mark Hill (Baker Hill), John Dymond (Celerity), Dan Baker (National Geographic), and Jason Kolaitis (Celerity).

GOVERNANCE

Ownership

National Geographic's Internal Communications team oversees ngconnect's strategy, day-to-day operation, and content. Members of National Geographic's Technology team are also involved in supporting Help Desk inquiries from staff and the infrastructure that ngconnect is built on. Although Internal Communications might be the "owner" of ngconnect, content contribution is encouraged from across the organization, and the team believes that this will be key to sustaining the intranet in the years to come.

"Internal Communications' overall stake in the intranet has been a positive opportunity," says Vaccaro. "As communicators, it has allowed us to make the site more engaging through visual and dynamic design and content.

"As owners of the intranet, it has also helped establish the relatively new Internal Communications team and its work across the Society," she says. "The scope of ownership is much greater than in years past, since we now maintain all content across the site."

One challenge has been that, at certain points, the Communications team found itself tasked with making decisions related to data or technology, which Vaccaro says doesn't naturally fall within the team's core area of expertise. "The solution for this has been to partner with an external vendor who has that expertise, and pull support from other areas within the organization—such as the internal technology team—when we can," she says.

INTRANET TEAM RESPONSIBILITIES	
Role	Responsibilities
Internal Communications Team	<ul style="list-style-type: none"> • Intranet strategy • Budget management • Coordination of internal and external technology resources • Maintaining content quality across site • Publishing daily homepage content • Training and support for content contributors • Post-launch enhancements • Setting and maintaining style and editorial guidelines
Content Contributors	<ul style="list-style-type: none"> • Creation and maintenance of department/division/universal content • Creation of timely news and event posts
Technology Team	<ul style="list-style-type: none"> • Maintenance and monitoring of Ektron CMS and servers • Tier 1 support/Help Desk inquiries from staff
Celerity	<ul style="list-style-type: none"> • Post-launch development • Site maintenance • Troubleshooting CMS or front-end issues

USERS

The site is designed for all of National Geographic's employees, international partners, channel partners, and contractors. The type of work performed at National Geographic varies widely, with hundreds of different roles supported by the intranet within this diverse organization. Example roles include producers, graphic designers, editors, researchers, managers, interns, and writers.

URL AND ACCESS

ACCESS INFORMATION	
Item	Status
URL	<ul style="list-style-type: none">ngconnectonline.org (web and mobile)
Default Status	<ul style="list-style-type: none">The Technology team sets each new employee's homepage as ngconnectonline.org, but employees have the ability to change it.
Remote Access	<ul style="list-style-type: none">Users can access ngconnect remotely through ngconnectonline.org, which prompts them to enter their username and password to authenticate themselves through the Okta single sign-on service. National Geographic encourages teleworking, and users regularly access ngconnect off-site, whether in D.C. or at one of the organization's satellite offices.

DESIGN PROCESS AND USABILITY WORK

Design Approach

The key to getting an intranet project done on time and within budget is to not let the perfect be the enemy of the good. Although every team strives to do its best work, perfection is rarely within reach. "We tried to follow the typical User-Centered Design (UCD) process as best we could," says Jason Kolaitis, Lead User Experience Designer, Celerity, "but in reality, due to timelines and budget constraints, following the process to a 'tee' is pretty difficult. Luckily, we were able to accomplish the majority of UCD tasks in order to create a highly successful intranet design."

Kolaitis says they built the intranet around the core needs of the end users. "We didn't try to build something we *thought* users might need," he says, "we built something we *knew* users needed." Using one-on-one interviews, focus groups, card sorting, content inventories, and a lot of web research, the team was able to create an intranet that filled a void for many National Geographic employees.

The design process kicked off with the team interviewing stakeholders and employees and completing a baseline review of the existing intranet to get an understanding of what already existed, and where the site needed to go for the future. Overall, the team found that users were mostly happy with the information on the site, although it was clear that it needed a visual refresh and that the site's IA—which had grown organically for several years—was no longer manageable.

Minimal analytics data was available to analyze traffic patterns and frequently used content, so the team decided to perform focus groups with end users; this would let the team dive deeper into key business issues, desired intranet use, and important integration points. The result of these efforts was a set of prioritized features that would help employees accomplish their jobs, including:

- *Employee Directory* with enhanced profiles (with self-service capability)

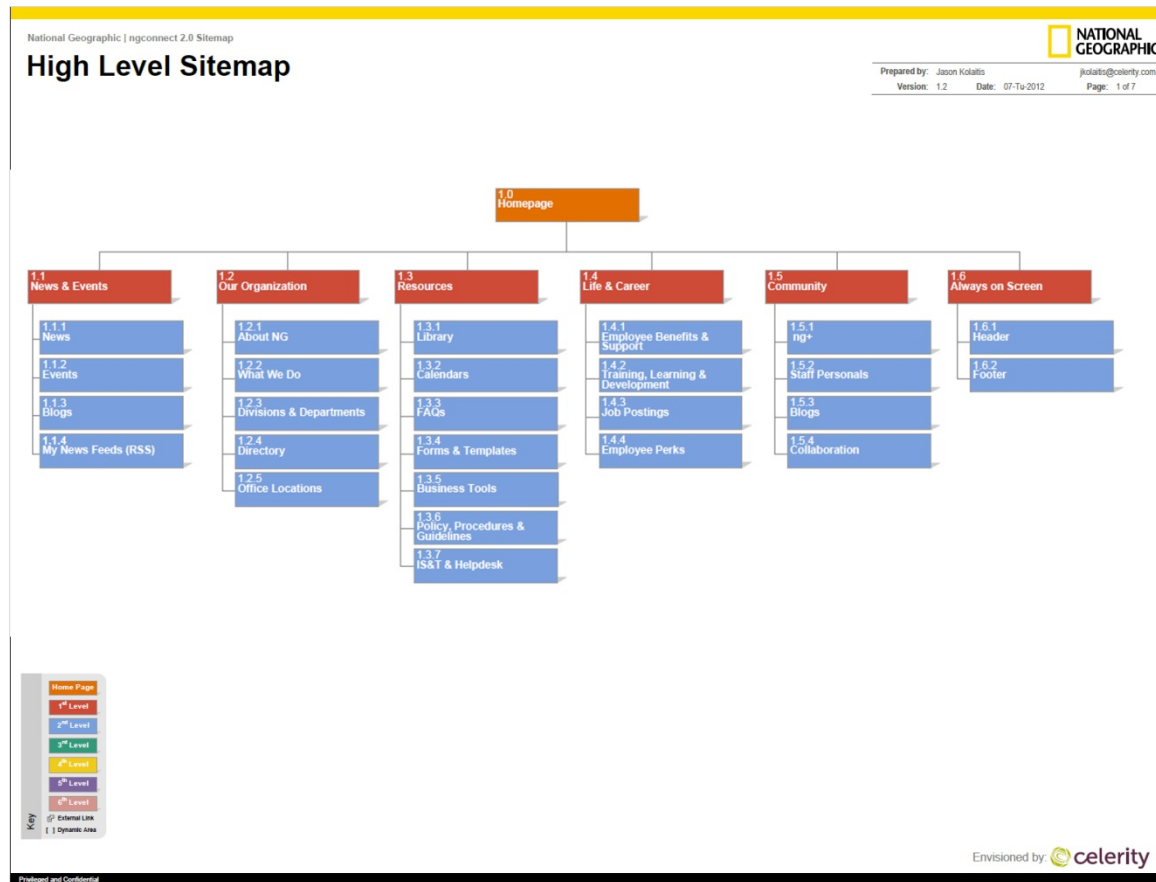
- Organization chart
- Generic and customizable quick links
- Basic enterprise calendar capability
- Social capabilities (blogs, micro blogging, and classifieds)
- Robust search
- Single sign-on
- Online form submission capability
- Mobile access (with highest priority on the *Employee Directory*)



Pictured: This parallax scrolling microsite on the *History and Heritage* page showcases the history of National Geographic in a fun and engaging way.

Developing the Information Architecture

The new IA was achieved through a series of online card-sorting tasks (to iron out and finalize the new site map) and by developing and testing a series of clickable prototypes (using Axure RP).

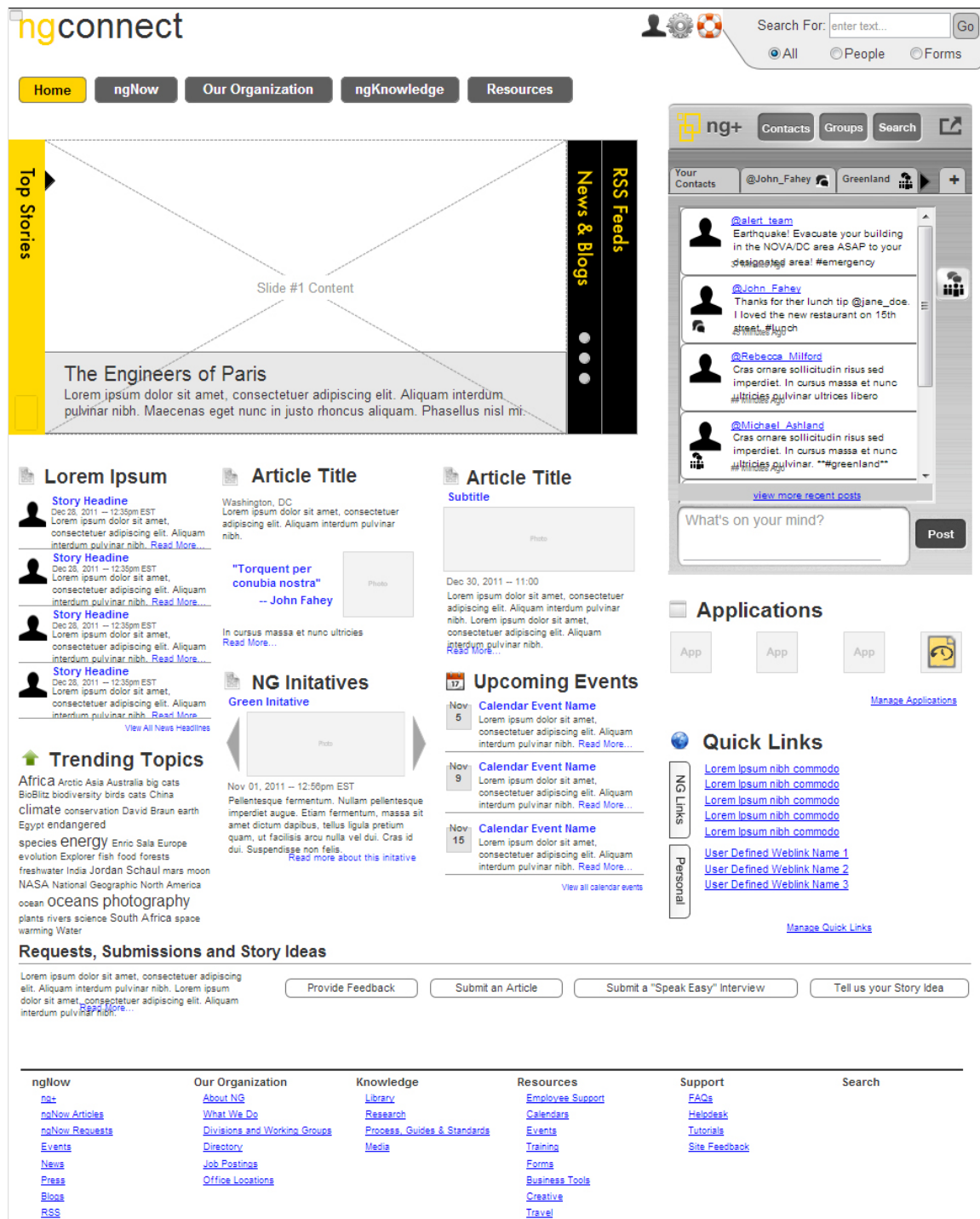


Pictured: The proposed high-level site structure.

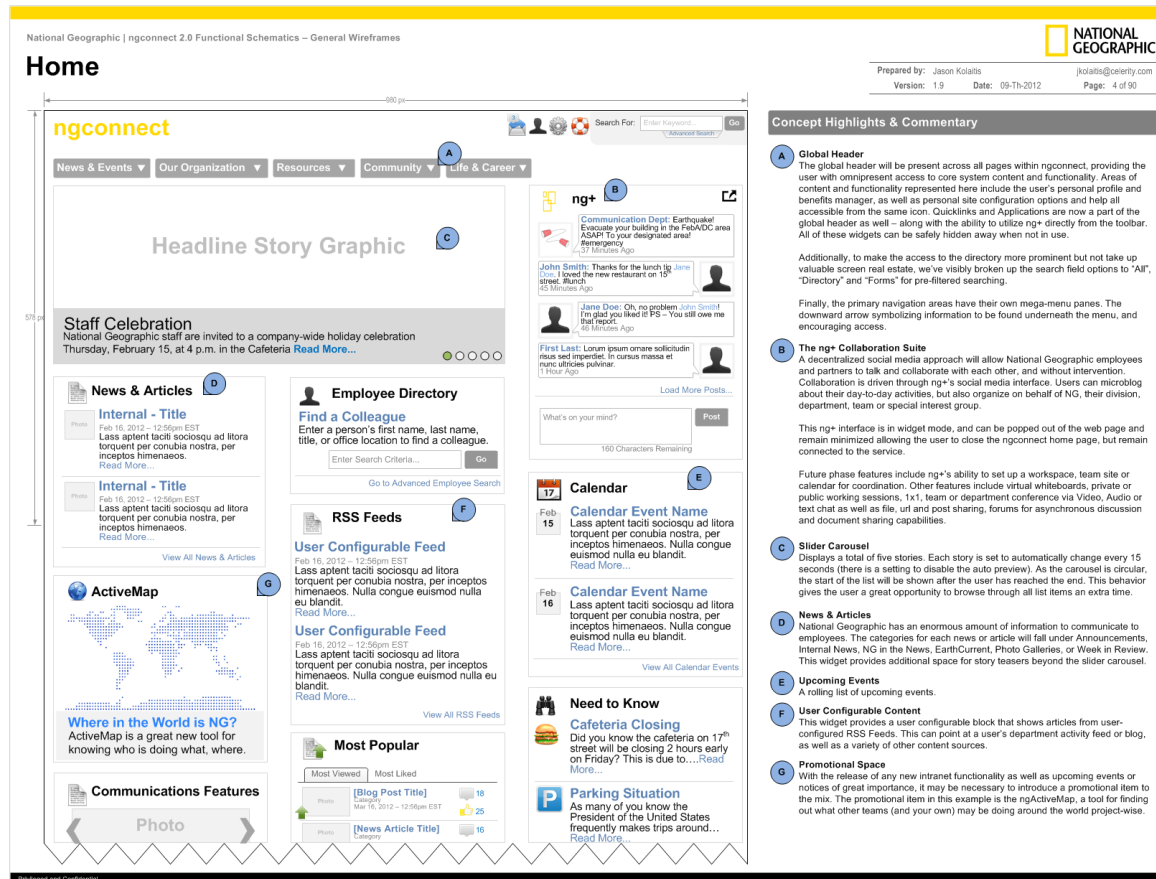
"Overall, the tests went well, but we were surprised to find out that users had extreme difficulty using the megamenu we originally designed," says Kolaitis. "The 'on-hover' states for the megamenu caused significant problems during the tests, as users weren't able to easily close them, and anytime the user's cursor crossed through the navigation bar the menus accidentally appeared. We clearly needed to fine-tune the delay for these interactions."

This was one of the team's primary takeaways from the usability testing.

Also, says Kolaitis, users experienced information overload and were overwhelmed by the amount of content in the menus. "So, in the final design, we also reduced the amount of content in the menus and only surfaced the most popular content," says Kolaitis.



Pictured: The initial Axure clickable prototype.



Pictured: Homepage wireframes for ngconnect.

After the initial discovery and conceptual design phase, the team began designing the remaining templates and the site's core functionality. This process and the rest of the project followed an Agile methodology, which let the development team review and demo its progress every two weeks to both the core user team and stakeholders. It also gave the team an opportunity to get regular, direct feedback from users.

Working with Outside Agencies

National Geographic partnered with an outside consulting firm, Celerity, to provide a full end-to-end solution including discovery, strategy, platform selection, user experience design, and development.

One of the core reasons for engaging an outside technology vendor was that the organization wanted to bring a platform-agnostic viewpoint to the table during these early project stages. Ultimately, the new intranet's chosen platform had to fit with National Geographic's technology strategy; however, at that stage, the team didn't want to limit itself to considering only platforms supported by internal expertise.

The organization also worked with D.C.-based design firm Baker & Hill to develop the intranet's visual design concept.

These outside agencies were tightly integrated into the design process, working side-by-side with National Geographic's internal resources.

"Our relationship with each agency was to work with them as a team," says Vaccaro. "It was clear that National Geographic owned the product decisions, but at times relied on Celerity's expertise in website design and development. During the initial stages of the project, the Celerity team worked onsite for several weeks at a time at National Geographic's HQ, which created a positive and productive team environment."

Once the development sprints began, Celerity's development team worked offsite and interacted with the National Geographic team through daily Scrum calls and periodic onsite demos and meetings. Celerity's project manager was onsite regularly, while the rest of the team worked onsite as needed.

TIMELINE

The overall redesign time frame was 16 months from discovery to launch.

INTRANET TIMELINE	
Milestone Date	Milestone Description
December 1999	<ul style="list-style-type: none">Original company intranet, Inside NGS, launched
March 2006	<ul style="list-style-type: none">Redesigned NG Insider launched (winner of NN/g Intranet Design Annual 2007)
September 2011	<ul style="list-style-type: none">Homepage facelift (v. 1.0) to support a more visually appealing experience pending upcoming redesign
September–December 2011	<ul style="list-style-type: none">Discovery and design phase, including usability testing with prototype and platform selection in preparation for 2.0 redesign
Late January–February 2012	<ul style="list-style-type: none">Environment and tools/systems setup, Agile education, and ngconnect 2.0 project kick-off
March–mid December 2012	<ul style="list-style-type: none">Development, testing, training, and content upload for new intranet site
December 14, 2012	<ul style="list-style-type: none">Launch of ngconnect 2.0
January 2013 to date	<ul style="list-style-type: none">Continuous improvements through small and iterative enhancements based on user feedback; changes so far include improved search, enhanced social tools, and an image gallery
July 2013	<ul style="list-style-type: none">A survey and usability testing conducted to assess ngconnect 2.0 success and room for improvements

CONTENT AND CONTENT CONTRIBUTORS

Choosing a Platform

To identify the best platform for National Geographic's content management needs, the intranet team had to understand, at a high level, the different types of functionality the organization required. So, team members looked to the findings from their discovery efforts, including stakeholder interviews and focus groups, and also reviewed the technology landscape.

According to Susana Esparza, Scrum Master and Project Manager, Celerity, this process resulted in the identification of three types of tools:

- Web content management tools
- Portal technology (providing a single point of access for applications, information, data, and processes)
- Enterprise social and collaboration platforms

To reduce the number of platforms to review and demo to a manageable quantity, the team focused on 10 criteria:

- Core functionality/built-in applications
- Content management (authoring, publishing)
- Search
- Light document-management capabilities
- Portal/personalization capability (such as the ability to customize dashboard with widgets and display data from other systems)
- Social media (such as wikis, blogs, community features)
- Flexibility/customization (in terms of the platform)
- Scalability/performance
- Ease of implementation and ongoing maintenance
- Intuitiveness/ease of use (for both end users and content contributors)
- Interoperability with other systems
- Price
- Strategic fit (in terms of product direction and/or National Geographic's vision)
- Vendor stability and/or open source community support

With these criteria in mind, Ektron emerged the winner. Overall, Ektron performed best against the criteria listed above and met most of the high-level requirements gathered during the design phase via a fit-gap analysis. "Ektron also did a very good job by demonstrating how their product was able to complete task-based scenarios provided to them by the ngconnect team," says Esparza.

Content Authoring

National Geographic's Internal Communications team maintains most of the general communications content. However, the site was designed to support distributed content ownership so that authors throughout the organization can easily update and maintain their content. Across the site, divisional and functional content is owned and developed by the respective teams, while more global/shared content—such as events, news, and resources—are managed by a select group of individuals assigned to represent their division/function within the organization.

ngconnect has various groups for content ownership, depending on the site section. Following is a list of the groups and the number of content owners in each:

- Alert authors: 3
- Blog authors: 20

- Department authors: 83
- Events authors: 27
- Life/career authors: 16
- News authors: 23
- Resources authors: 27
- Sustainability authors: 4

Approximately five contributors work actively on content on a day-to-day basis, updating dynamic elements such as news and events. For other content, such as departmental pages and resources, content is updated weekly, monthly, or as needed.

Through the ng+ social tool, intranet users can also contribute to the site regularly via comments, posts, “likes,” and shares. This opens information sharing and content ownership to the entire user population.

Templates and Guidelines

The organization has a light editorial approval chain in place. All homepage headline news is approved through the ngconnect team. Contributors who have received training in ngconnect’s editorial guidelines create content for other sections.

Templates help order and structure the content. Several templates were created to allow content contributors to create their own site sections and subsections. Some templates address specific needs (for example, the *Bio* page template) and some simply offer authors different layout options. In addition, editorial guidelines and a content checklist (see the excerpt below) were created to help authors with tone, voice, style, and images as they create their pages. The main content contributors for each department have also received an in-depth classroom training session on editorial guidelines.

Editorial Guidelines: Checklist

Tone & Voice

- ☐ Conversational and engaging; relevant; energetic and exciting

Organizing Content

- ☐ The most important points are presented in the first two paragraphs
- ☐ A short one-paragraph summary is presented to sign-post content
- ☐ Paragraphs are short (40 to 100 words)
- ☐ Key page elements are visible through Q&As, bulleted lists, bolding etc.
- ☐ Descriptive hyperlinks tell readers WHERE they are going

Writing Content

- ☐ Sentences are short and written in active language
- ☐ Content is written in second-person
- ☐ Explanations are provided where needed
- ☐ Hyne, buzzwords, jargon, business "talk", idioms, ambiguity etc. are avoided

Pictured: An excerpt from ngconnect's editorial guidelines checklist.

In addition to the editorial guidelines, content contributors are always welcome to review their content with the Internal Communications team. "Within the CMS, we provide a few tips on the content entry form as reminders to ensure standards and consistency. We are also planning an annual audit of content," says Megan Seldon, manager of Internal Communications.

Training

In preparation for the new intranet's release, the ngconnect team conducted train-the-trainer sessions with key contributors across the organization. These sessions were focused on the different types of content owners (such as news authors, departmental page authors, and document owners) so that the training would be effective and in context with what authors would own and be responsible for creating and maintaining.

"Through this method, we established a mechanism in which contributors are able to teach others as changes in the organization happen, and allow for this training to grow organically," says Esparza. "The intranet implementation team also created training material for the various sessions for future reference."

TECHNOLOGY

"ngconnect was built as a gateway platform that can easily integrate new systems and feeds" says John Dymond, Lead Architect and Developer, Celerity. "This will allow for flexibility should the organization decide to change the systems it interacts with. It also allows for new systems to be plugged in without changing the programming of existing systems."

In an effort to save users time, the site uses single sign-on, which gives users fewer passwords to remember, helps reduce phishing, and improves the overall user experience. Users no longer need to first sign into a VPN, then sign into the intranet, and then sign into their department's Google Site.

TECHNOLOGY	
Category	Technology Used
Web Server Hardware and O/S	<ul style="list-style-type: none"> • Web Server: 16GB RAM/50GB hard drive • Database Server: 8GB RAM/500GB hard drive storage • Search Server: 16GB RAM/250GB hard drive storage • Dev/Staging Servers: 2GB RAM/60GB hard drive • All Servers run under Windows Server 2008 R2 Standard (64-bit) SP1 and have Intel Xeon CPU X5650 at 2.67GHz/2.66 GHz (2 processors)
Bug Tracking/Quality Assurance	<ul style="list-style-type: none"> • BugHerd (http://www.bugherd.com)
Design Tools	<ul style="list-style-type: none"> • Adobe Photoshop • Microsoft Visio 2010
Site Building Tools	<ul style="list-style-type: none"> • Visual Studio 2010 • Team Foundation Service
Content Management Tools	<ul style="list-style-type: none"> • Ektron CMS Version 8.60 SP1
Search	<ul style="list-style-type: none"> • Microsoft Search Server 2010
Other Functions	<ul style="list-style-type: none"> • Integrates with Okta SSO • Integrates with Oracle PeopleSoft • Uses Gigya to import employee information from LinkedIn

MOBILE

The ngconnect mobile site leverages mobile-specific templates that focus on key sections of the full desktop site. "We wanted to make sure we invested the correct amount of time and effort on the 'portable' part of the intranet," says Elisabeth Beller, Project Advisor, Celerity. "We identified three key main areas that people always need access to whether on travel, walking from one meeting to another, or simply checking in from home: directory, news, and ng+."

Making the *Employee Directory* mobile-friendly was a priority, as many users search the *Employee Directory* on their mobile devices. “The National Geographic headquarters in Washington, D.C., houses staff across three neighboring buildings,” says Beller. “People often walk from one building to another to go to meetings, visit the cafeteria, or chat with one of their colleagues. Although the campus has maps displayed in key places close to elevators, these don’t have the level of details needed to find a person or meeting room. By accessing the *Employee Directory* through their mobile device, one is able to find the desk number, floor, building, phone number, and email address for the person they need to reach.”

Because making the entire site available on the phone wasn’t a top priority, and because the Ektron CMS provides an easy mechanism to use mobile templates to produce a mobile site, the team opted for a mobile-optimized version of the site, rather than a custom mobile solution or application. The mobile version of the site is optimized to provide the key content useful to most employees. The mobile templates for the *Employee Directory*, news, and ng+ are powered by the same content on the full version site.

“We leveraged the same user research completed at the beginning of the project to guide decisions regarding the content to be available on mobile and the approach for developing the mobile site,” says Esparza. “Budget and resource constraints were also a factor, which led us to the most straightforward solution within the CMS.”

The mobile site is targeted for iPhone and Android devices. It is not a native application, but uses jQuery Mobile to take advantage of swipe actions and page transitions. Using HTML5 meant the site would be compatible with National Geographic’s core campus technology infrastructure and supported browsers.

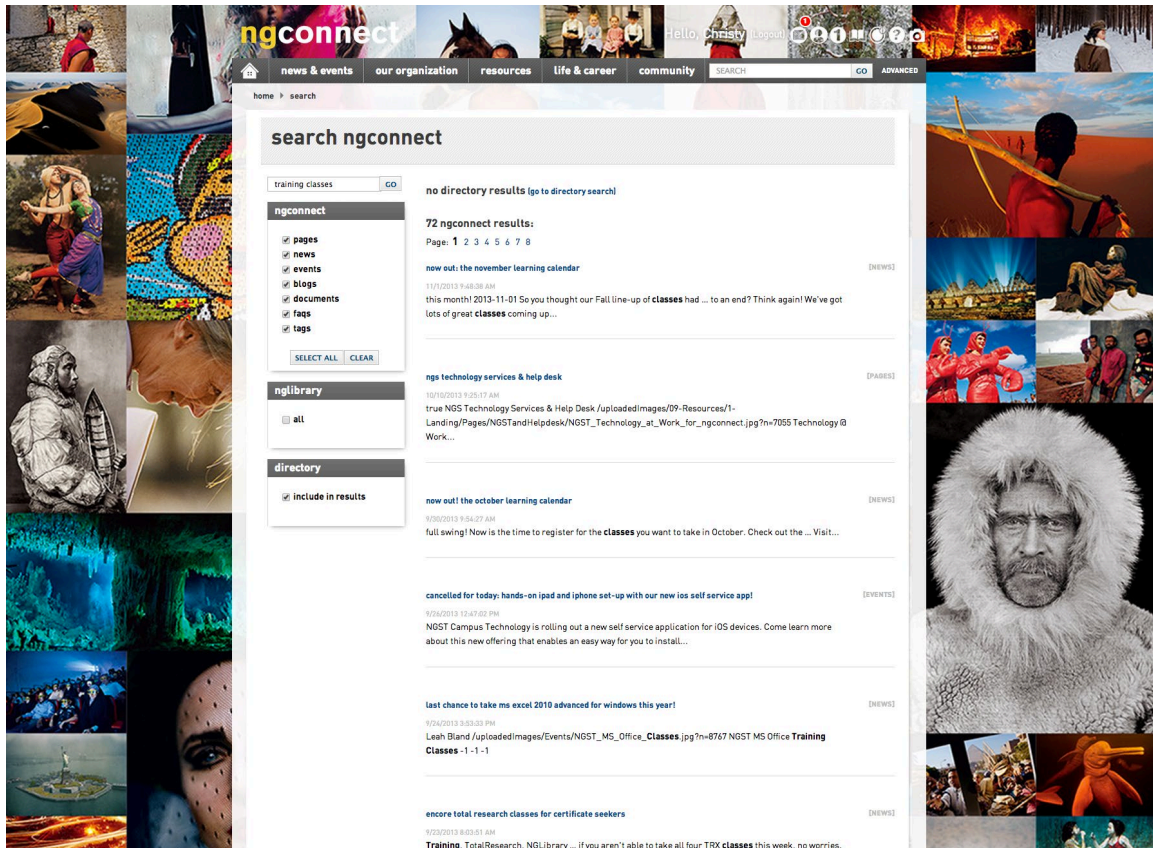
SEARCH

As with most intranets, the National Geographic team found that users had problems finding information on the previous intranet; team members did their best to fix that by creating a federated search with easy-to-use search facets. The federated search indexes all of the remaining department Google sites, the HR PeopleSoft/Oracle Database, Ektron CMS SQL Database, and RSS feeds from multiple sites.

Search is handled by Microsoft Search Server, which is built into the site’s CMS, Ektron (as of version 8.6). “The product team has spent considerable effort developing Microsoft’s search connector to work with the product, and we wanted to leverage these capabilities,” says Dymond.

“We have configured Search Server to federate a number of different data sources,” he says. “We created a BDC source so that Search Server can index PeopleSoft data such as directory, department, and location information. In addition, a number of National Geographic sites and microsites are indexed so that they can be included or filtered from global search.”

Searches are context-sensitive, and users can search within several subsets. This permits global or very specific searches, depending on the user’s needs.



Pictured: An example search results page.

RESULTS AND ROI

Employees have responded well to the new site. Various measurements show that the site is becoming a valuable asset for the organization's employees in their daily work life.

"In a survey conducted seven months after launch, we asked employees whether they found the new site an improvement from its predecessor—almost 70% agreed it was," says Vaccaro. Sixty-five percent of survey respondents also said they use ngconnect at least once a day.

News and Events content, which is designed to ensure employees know "what's going on" at National Geographic, rated highly in the survey, with 88% of employees rating it a four or a five on a five-point usefulness scale.

Another measure of success is exemplified by the success of the *Employee Directory* (and employee profiles): 80% of employees rated it as one of the new site's most useful features. In usability testing, one employee said:

"I'm absolutely in love with the Directory, I'd buy it dinner. It's helped me do my job better. I didn't think it would make that much of a difference, but it has made a world of difference."

The organization has also seen promising levels of adoption for the site's social features:

- Two thirds of employees have updated their profiles and around 25% are actively using ng+ for asking questions or sharing information with their networks.
- More than half of employees have either commented on or “liked” articles or content posted by their colleagues or Internal Communications.
- Employees feel comfortable weighing in on organizational decisions and contentious issues via the comments section on internal news articles.

And, as employees use the site, they’re exploiting opportunities to find new ways to use it. “Since the overall site is much more attractive and engaging, we’ve also had more employees requesting to have their departmental content featured, or coming to us with suggestions of how we could leverage some of the core functionality even further,” says Vaccaro. “The site is also at the center of all major company announcements.”

LESSONS LEARNED

Vaccaro shares some of the team’s lessons learned:

- **A phased approach is useful.** “One of our main takeaways was that we should have considered a phased site launch. This would have eased the workload on project team members—the last few weeks prior to go-live were intense ones—but most importantly, it would have eased users into the new content, functionality, and design.
- **Prioritize the build based on the complexity of the components.** “Another lesson learned was around the development of ng+, the social component of ngconnect, which occurred toward the end of the project. This was one of the more complex aspects of the site. We may have benefited from developing this component earlier in the process, giving us more time for testing and employee feedback prior to launch.”
- **Communication efforts increase adoption.** “Continual employee communication of the benefits and features of the new site, especially around the social tools, has helped increased adoption. Activities have included special staff photo days, where employees get a smart, new profile photo taken for their profile; demo videos; a special Valentine’s Day promotion and giveaways; plus senior managers microblogging around important meetings, travel, and organizational developments.”
- **An Agile approach can bring clarity to the project.** “We found that the Agile project methodology introduced by Celerity brought us the right level of focus, flexibility, and stakeholder engagement required for the project.
- **Plan for post-launch communication needs.** “While it sounds obvious, the work doesn’t end when you go live. In the weeks after launch, we dealt with a high volume of user questions and requests, department demos, and continued employee outreach and communication. Be prepared for that.”

- **Managing an intranet is a journey, not a destination.** “After coming full circle as a Nielsen Norman award-winning intranet in 2007, to one in dire need of a complete redesign some six years later, perhaps the biggest overall lesson is placing real importance on continuous improvement. The organization has invested in redesigning the intranet, and the best way to protect that investment and continually engage employees, is by constantly looking for ways to improve, and actively engaging employees in that process.”

American Cancer Society (2016)

OVERVIEW

COMPANY

The American Cancer Society (ACS) is a global grassroots force of 2.5 million volunteers saving lives and fighting for every birthday threatened by every cancer in every community. As the largest voluntary health organization, the ACS's efforts have contributed to a 20% decline in cancer death rates in the US since 1991, and a 50% drop in smoking rates. Thanks in part to ACS efforts, 14.5 million Americans who have had cancer and countless more who have avoided it will celebrate birthdays this year. The ACS is the nation's largest private, not-for-profit investor in cancer research, ensuring people facing cancer have the help they need and continuing the fight for access to quality healthcare, lifesaving screenings, clean air, and more.

Headquarters: Atlanta, Georgia

Company locations: Headquartered in Atlanta, the ACS has regional and local offices throughout the US that support 11 geographical divisions and ensure the ACS has a presence in every community.

Locations where the intranet is used: All ACS locations across the US.

Annual revenue: Approximately \$840 million USD in 2014

THE INTRANET

Users: Approximately 6,000 employees visit ACS's Society Source intranet every day to learn the latest cancer and organizational news and connect to resources, tools, and people to help them perform their jobs.

Mobile approach: Society Source was developed using responsive web design and the intranet is accessible from most mobile devices. A significant number of employees and most external users (such as volunteers) use the portal.

Technology platform: SharePoint 2013

TEAM

ACS: Amy Haddock, Senior Director, New Channels; Anne Hartwick, Senior Consultant, Society Source Intranet

Neudesic: Matthew Schafman, Solutions Partner, Ideation, Design & User Experience; Chris McCurry, Senior Solutions Partner, Ideation, Design & User Experience; Mitesh Patel, Client Partner

Leadership: Brooke Rivera, ACS Project Manager; Sheila Buchert, ACS Business Lead; Laurie Entrekin, ACS Project Team Member; Kevin Weigel, IT Business Lead; Ravikumar Balasubramanian, ACS Project Team Member; Jay Ferro and Greg Donaldson, Project Sponsors; Matthew Schafman, Neudesic National Solutions Director, UX; Brad Laudel, Neudesic Engagement Manager; Sathish TK, Neudesic National Solutions Director, Portals & Collab

Design (Creative Services): Approximately three people from Neudesic were involved in the research and discovery of the personas' business processes and content needs. Later, a five-person team from Neudesic and ACS Marketing used this research to define the strategy and IA, and then created wireframes and prototypes for testing. One member from Neudesic and one from ACS worked on the visual branding requirements and delivered comps to the offshore front-end development team.

Development (Neudesic): Sathish TK, Lead Architect; Poornima Neelakandan, Technical Project Lead; Vamshi Budarapu, Senior Consultant; Anand Reddy, QA Engineer; Shekhar Sharma, UX Lead; Travis Simpson, Senior UX Consultant; SaiKrishna Thatti, Developer; SuryaNarayana V, Developer

INTRANET TEAM



Team members shown here (top to bottom, left to right): American Cancer Society: Ashok Vantipalli, Kevin Weigel, Anne Hartwick, Brooke Rivera, Laurie Entrekin, Sheila Buchert, Stacey Kuria, Amy Haddock, Ravi Balasubramanian, Melinda Baker; Neudesic: Matthew Schafman, Mitesh Patel, Chris McCurry, Sathish TK, Brad Laudal, Susan Laurento, Kunaal Kapoor, Poornima Neelakandan, Travis Simpson.

HIGHLIGHTS ABOUT THIS WINNER

Faced with an aging intranet built on out-of-date technology, American Cancer Society (ACS) started a major overhaul to rebuild and unify its myriad sites. As the largest voluntary health organization in the US, ACS aimed to create a site that would support employees and volunteers alike.

To create the new Society Source intranet, ACS worked with the Neudesic agency, which defined the site's ultimate goal: to increase user adoption. The path to doing that included a new site structure, a refresh of site content, and the addition of new and inclusive tools to drive users to the intranet. The effort has been successful: Society Source is now ranked as "most useful" among the eight channels ACS uses for internal communications.

- **User-Focused IA:** One of the site's greatest improvements was the move to a task-based IA. This shift moved content that was previously siloed (based on the department that created it) into common areas. Users can thus locate content without needing to understand the organizational structure. It took time and effort to convince content holders about the value of this improvement, but the hard work paid off.
- **Reduced Content:** The content reduction effort began with an in-depth examination of content on various ACS sites using feedback, surveys, and analytics. Outdated and duplicate information was eliminated, and the remaining content was categorized by audience (rather than creator) to help determine the best place to store it.

Information specific to departments or teams was moved to appropriate share drives or team sites. ACS dedicated a project manager exclusively to this content culling process, which was essential to its success. The manager motivated the already busy content owners to keep up with tasks and deadlines in order to improve the site experience.

The reduction in content, along with the unification of different sites on different systems, resulted in cuts to the number of servers needed, reducing their associated costs by 62%.

- **Creation of Communities:** The new site supports departmental and initiative-focused communities. These communities support enterprise-level access to information to help support collaboration and evidence-based decision making.
- **Consistent User Experience:** The previous set of ACS sites included many with completely unique user experiences, designs, and navigational structures. The redesign created a consistent experience for areas such as jobs, HR, and IT, which were previously managed separately.

BACKGROUND

Given the time and money that goes into launching and running a corporate intranet that is customized to an organization's specific needs, it's reasonable to try to squeeze every last ounce of use out of an aging system before deciding to pull the plug. However, at some point, an aging intranet can no longer be held together with duct tape and bailing wire. The ACS had reached that breaking point with its existing intranet, Society Link (aka "The Link").

Despite attempts to keep its Plumtree software on life support, extensive customization meant that the software could no longer be upgraded, leaving ACS with an unsupported intranet platform for more than five years. ACS was thus at the mercy of an antiquated platform that caused several outages per week and failed during major organizational events. The organization's IT department had undertaken several stabilization efforts by introducing hardware redundancy and load balancing, yet software failure continued to be a severe risk.

ACS essentially had two options: migrate to the latest Oracle Plumtree platform or leverage its own SharePoint 2013 environment and secure a partner to help design and develop a new site and also assist with migration and training.

Ultimately, the team elected to design and build a new IA and migrate The Link's current, viable content onto SharePoint 2013. This decision tied into the organization's long-term IT strategy. It would also benefit ACS in terms of cost savings resulting from adopting a fully integrated, unified Microsoft platform.

Although the decision to migrate the intranet to SharePoint was not an easy one, it let the team simultaneously address some of the intranet's other shortcomings. "The Link had not been able to serve as a dynamic, user-centric, mobilized collaboration platform for our staff and volunteers," says Amy Hadsock, Senior Director, New Channels, "neither was it extensible nor scalable."

A new platform would allow the team to truly tailor the intranet environment to ACS's changing needs. It let the team create a new IA model to reflect ACS's recently unified, strategic enterprise model; foster new ideas and enhance communications; reduce business disruptions; and enhance cross-functional collaboration.

"Additionally," says Hadsock, "a single, aligned organization presents the opportunity for revamped governance and security policy — with well-defined roles and responsibilities — that extends across multiple platforms, such as hardware, software, internet browsers, mobile devices, etc., which our new intranet, Society Source, provides."

Goals

The ACS team wanted the new intranet to tie into organizational goals that would help them make specific, achievable improvements. With that in mind, team members crafted the following list of improvements they hoped to achieve in the redesign project:

- Provide ubiquitous access to information
- Create opportunities for collaboration
- Support job functions
- Unify the user experience
- Improve the quality of information-finding and communication
- Support a culture of technology self-reliance
- Design an integrated architecture model
- Establish a governance model
- Provide version-control functionality

- Support business intelligence
- Reduce or eliminate technology and software business interruptions and performance degradation
- Reduce costs
- Reduce administrative overhead
- Design better navigation
- Give workers tools to help them:
 - Publish
 - Share
 - Collaborate
- Remove technology impediments
- Personalize content
- Improve employee productivity through:
 - Single sign-on
 - Comprehensive search
 - Employee self-service features

Constraints

The intranet redesign project happened as ACS was undergoing a fundamental reorganization, which constrained the intranet project in many ways. The team had a limited resource pool; was unable to shift resources on an as-needed basis onto the project; and risked losing subject matter experts to other high-priority projects, maintenance and operational tasks, and attrition.

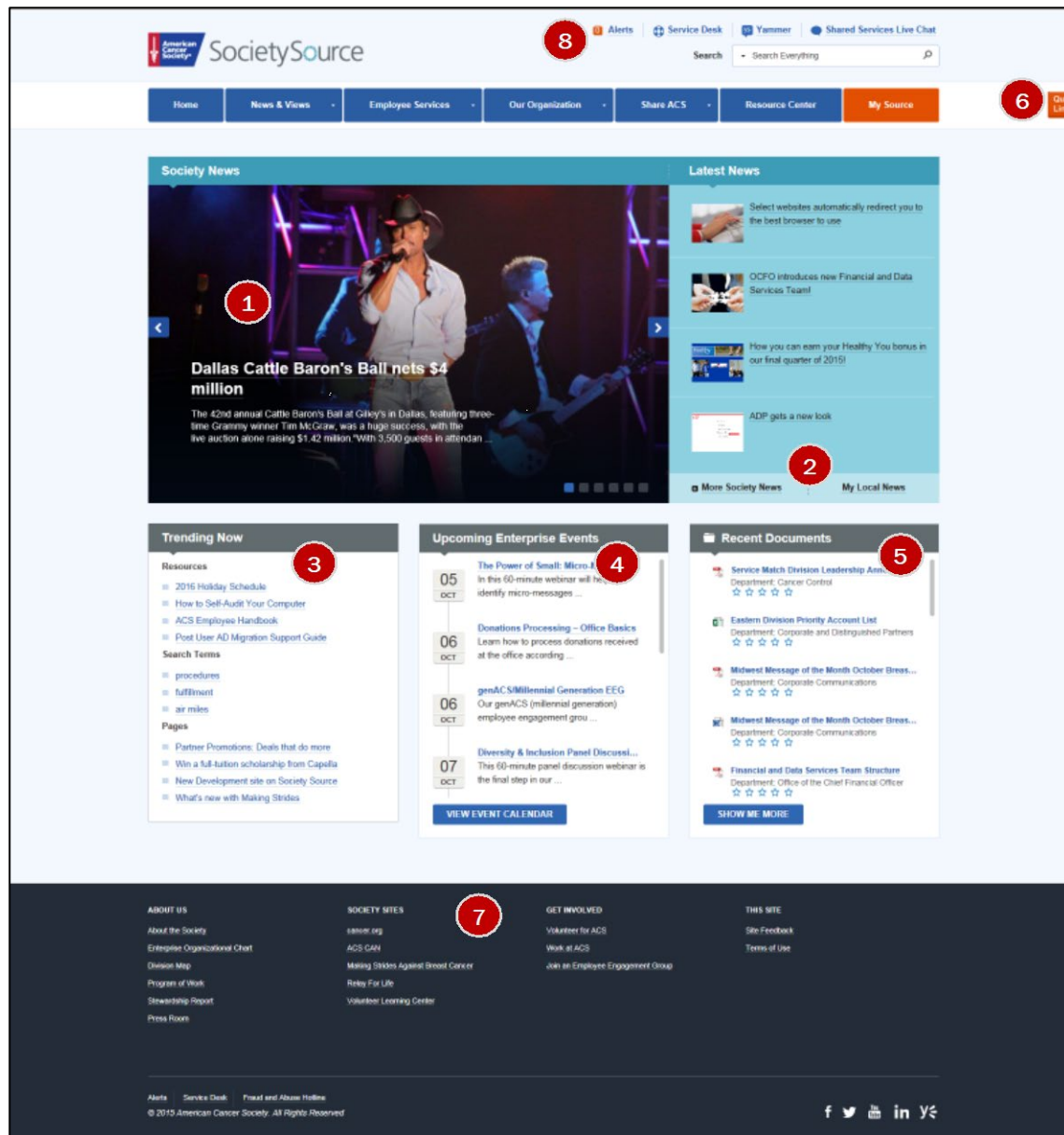
Kevin Weigel, IT Business Lead, explains how these challenges played out in planning the new intranet:

- **Resource constraints:** "Other high-priority projects and ongoing maintenance, training, and operational tasks threatened to subsume many of this project's key resources."
- **Interdependent initiatives:** "There were a high number of interdependencies with this undertaking. For example, this project was dependent upon a fully scaled, operating, fully provisioned/tested SharePoint infrastructure (development, QA, staging, production, and disaster recovery), all of which was under another project team's scope. The IA was also at the mercy of various interdependencies. There was no enterprise taxonomy defined and the intranet team needed to create an initial IA that worked for different departments."
- **Scope creep:** "While the project team was committed to painstakingly clarifying and qualifying this project's scope, there were a number of evolving variables and decisions that ultimately expanded and impacted this initiative's actual body of work."

- “For example, presently, some parts of the project and team sites exist on legacy SharePoint platforms (2003, 2007, and 2010). The migration of the content, workflows, and users of these sites, and the design, development, and implementation of replacement sites on the new SharePoint 2013 platform is currently out-of-scope. However, if ACS departments, divisions, programs, and/or communities require the intranet to interface with these projects and team communities/sites, the project team may need to assist in the design, build, and migration effort.”
- “Any and all databases, workflows, [and] business processes hosted on legacy Lotus Notes DBs may be considered for migration to SharePoint 2013 — and currently, this body of work is out-of-scope. Defining the right scope for the initial phase was always going to be a challenge, so prioritization was critical and keeping the expectations under control was difficult in the moving technology landscape after the initial user research. However, since the work on the initial phase is now complete, it may make sense to build the taxonomy and site structure to incorporate these efforts. Various stakeholder groups are considering migration/utilization of the SharePoint 2013 platform, and how these efforts will intersect with the new intranet project team is currently undefined.”
- **Workgroups for the ACS reorganization:** “The project team recognized the potentially considerable impact to scope, as the recommendations and their respective implications are presently unknown.”
 - “If any of the workgroups associated with the ACS reorganization publish actionable decisions that are contrary to this project’s scope, we will need to consider rebaselining the project.”
 - “Outputs from those same workgroups may broaden this project’s scope considerably; if this should happen, the project team may need to reprioritize.”
 - “Reorganization workgroups may produce outputs that include initiatives that take priority over and subsume resources of this project.”
- **Insufficient or inappropriate infrastructure:** “The SharePoint Infrastructure build team based their original architecture on generic Microsoft specs and assumptions, but the selected vendor will be conducting an architectural design review. This presents a risk that the results or recommendations will be substantially different and the infrastructure will have to be re-architected and/or additional hardware may have to be procured.”
- **Insufficient network:** “There is some level of risk that our current network may not sufficiently handle the additional load/demand of SharePoint.”

DESIGN REVIEW

Homepage



Pictured: American Cancer Society Intranet: Homepage.

Homepage Highlights

- 1. Carousel:** The homepage prominently features global news items in a carousel at the top of page. Users can page through the items in the main carousel via arrows on either side of the currently displayed item, and can also view additional headlines on the side of the carousel. This gives users quick access to multiple sources of information. The headlines in *Latest News* change throughout the day as new stories are published. Each story is represented by a photograph and headline.
- 2. News Access:** The site provides quick access to additional news stories at the bottom of the headlines list via links to *More Society News*, which leads to additional global headlines, and *My Local News*, which leads to more personalized news.
- 3. Trending Now:** Employees and volunteers can keep up on current site content in the *Trending Now* area. This section summarizes the resources, search terms, and site pages that are receiving the most traffic. This simple and automated feature keeps users informed of the site's most popular items, offering them insights into the current activities of both the organization and their colleagues.
- 4. Events:** The *Upcoming Enterprise Events* calendar lists each event's date and name, along with a brief description and a link to more details. Users can also directly access the site's complete event calendar via a link at the bottom of the list.
- 5. Recent Documents:** A summary of the most recent document-based content posted on the site appears on the right side of the lower column. Each document includes the name, responsible department, and a star rating. A link at the bottom of the list leads to additional documents.
- 6. Quick Links:** Floating *Quick Links* follow users on each page of the site. Because it stays in place as they scroll up and down on pages, this sticky element gives users immediate access to important information.
- 7. Fat Footer:** A footer at the bottom of each page provides quick access to additional content, including *About Us*, *Society Sites*, and *Get Involved*. Users can also quickly access ACS's Facebook, Twitter, YouTube, LinkedIn, and Yammer accounts via the logo-based links at the bottom of the footer.
- 8. Utility Links:** The site's utility links are *Alerts* (for time-sensitive messages and announcements); *Service Desk* (for quick access to support); Yammer (for social content); and *Shared Services Live Chat* (for real-time support). The *Shared Services Live Chat* is available Monday through Thursday, 7:00 a.m. to 7:00 p.m., and Friday 7:00 a.m. to 5:30 p.m. CT. Through this *Live Chat*, users can get immediate answers to questions about donations and invoice processing, event and program data entry, and other operational process questions.

Our Organization Page

The screenshot displays the 'Our Organization' page on the American Cancer Society's SocietySource intranet. The page layout includes a top navigation bar with links for Alerts, Service Desk, Yammer, and Shared Services Live Chat. Below this is a main navigation bar with links for Home, News & Views, Employee Services, Our Organization (highlighted with a red circle 1), Share ACS, Resource Center, and My Source. The 'Our Organization' section features a left sidebar titled 'Departments & Divisions' (highlighted with a red circle 1) which lists various organizational units. The main content area includes a 'Leading the Fight' section, an 'Important Links' section (highlighted with a red circle 2), an 'Our Mission' section, and an 'Announcements' section. A red circle 3 highlights the 'Important Links' section. The footer contains links for About Us, Society Sites, Get Involved, and This Site, along with social media icons and copyright information.

Pictured: American Cancer Society Intranet: *Our Organization*.

Our Organization Page Highlights

- 1. Task-Based Structure:** Information is now organized by task rather than department throughout the site; the main sections are *News & Views*, *Employee Services*, *Our Organization*, *Share ACS*, *Resource Center*, and *My Source*. The user's current location is indicated by a slightly lighter blue color in the navigation bar, as well as in breadcrumbs at the top of the page and in the navigational links on the side of the page. When a user is in a subsection of the site, a white highlight appears in the left side navigation to indicate the user's current location.

The *Our Organization* page includes all of ACS's functional departments and divisions and the work they do. Each group has its own site for collaboration. The pages are built with configurable web parts, so teams can easily manage their own sites and content.

- 2. Important Links:** Each section's landing page includes links to important or popular information at the top of the page. The links area includes a representative image of the department's programs or products and a brief introduction to the site section.
- 3. Our Mission and Announcements:** Each section's landing page includes key content for that section. The *Our Organization* page includes a reminder about the organization's mission, as well as links to relevant supporting documents (including the *Stewardship Report*), more about the global mission, and an infographic about the global cancer epidemic. This content is accompanied by a list of announcements relevant to the site section.

Resource Center

The screenshot shows the 'Resource Center' page of the American Cancer Society Intranet. The page layout includes a top navigation bar with links like 'Home', 'News & Views', 'Employee Services', 'Our Organization', 'Share ACS', 'Resource Center', and 'My Source'. Below this is a search bar labeled 'Search Resources' with a search icon and a checkbox for 'Include Brand Toolkit'. A sidebar on the left contains 'Resources' (Documents, Multimedia) and 'Additional Resources' (Brand Toolkit, Cancer Resource Connection, etc.). The main content area features 'Featured Resources' with 'Featured Documents' and 'Featured Multimedia' sections. At the bottom is a 'Recently Added Documents' table.

Numbered Callouts:

- 1:** Search bar input field.
- 2:** Search bar search icon.
- 3:** 'Additional Resources' sidebar section.
- 4:** 'Featured Documents' section header.
- 5:** 'Recently Added Documents' table header.
- 6:** 'Recently Added Documents' table body.

Name	Modified	Department
FAQs About The Society And Profit and Candidates	10 minutes ago	Corporate Communications
CyberArk Document Prescription: B	44 minutes ago	Talent Strategy
Lets Rock Incentive List	2 hours ago	Talent Strategy
2016 Flexible Benefits Program E	4 hours ago	Talent Strategy
Post User AD Migration Support G	4 hours ago	Information Technology
Internet Filtering Frequently Asked	7 hours ago	Information Technology
Website Access Form B	7 hours ago	Information Technology
Supervisor Toolkit for Onboarding	9 hours ago	Talent Strategy
High Plains Division - Managers	Yesterday at 6:04 PM	Talent Strategy
High Plains Division - Staff Com	Yesterday at 6:02 PM	Talent Strategy
Recruiter Recruitment Coordinator	Yesterday at 3:56 PM	Talent Strategy
Midwest All Staff Briefing Presenta	Yesterday at 3:51 PM	Corporate Communications
Lets Rock Tip Week 4 Be Inspired	Yesterday at 3:49 PM	Talent Strategy
Lets Rock Week 4 Testimonial Ru	Yesterday at 3:30 PM	Talent Strategy
Cisco Interactive VFN Logos	Yesterday at 3:02 PM	Information Technology
Lets Rock Week 4 Running Tips A	Yesterday at 2:00 PM	Talent Strategy
Lets Rock Tip Week 3 Nordic Wat	Yesterday at 1:03 PM	Talent Strategy
Nordic Walking Lets Rock Tip She	Yesterday at 12:51 PM	Talent Strategy
September 2015 Manager Briefing	Yesterday at 10:46 AM	Corporate Communications
Wellness Champions	4 days ago	Talent Strategy

Pictured: American Cancer Society Intranet: *Resource Center*.

Resource Center Highlights

- 1. Prioritized Search:** One of the biggest complaints about the previous intranet was the difficulty of finding documents. The new site centralizes documents and multimedia in a single *Resource Center*, with the search feature front and center. This helps users quickly find the information they need. Crowd-sourced tagging, here and throughout the site, allows for constant refinement of metadata, which helps improve the search.
- 2. Brand Toolkit:** Users can choose whether or not to include the Brand Toolkit in the search. The Brand Toolkit is a digital asset repository for all of ACS's branded materials, guidelines, and messaging tools, including logos, photos, fact sheets, brochures, posters, print and web advertisements, and videos. The team decided to exclude this repository from standard site searches, but it can be added to search for those who need its specific content. This made the Toolkit data available through the site, even though it is not fully integrated with the rest of the search tools.
- 3. Resources:** Users can navigate directly to only documents or only multimedia resources as needed. The *Resource Center* page also includes links to popular resources that are not within its library, including the Brand Toolkit and the Cancer Infographics Gallery. Each external link is accompanied by a brief description of the content users can find there. Providing these links notifies users that those libraries are in another place; it also gives users quick access to them from a central spot on the main intranet.
- 4. Promoted Content:** Promoted content appears in the *Featured Resources* and *Featured Multimedia* areas. The Society Source's content creators self-select the items in *Featured Resources* based on an item's priority and the general view of its importance. *Featured Resources* changes daily and gives intranet users quick access to high-priority content.
- 5. Recently Added:** The *Resource Center* also offers users a list of *Most Recently Added* documents, which includes the document title, information about when the document was last modified and which department added the document.
- 6. Adding Documents:** Society Source content creators can add a new document by clicking on the "plus" sign below the *Recently Added Documents* heading or by dragging and dropping a file onto that page area. This drag-and-drop functionality makes it quick and easy to add a document to the library; however, the feature's placement is a bit unexpected and could be moved to the top of the page or otherwise made more prominent.

Search

Search

Result type

Email

Excel

PDF

PowerPoint

Web page

Word

SHOW MORE

Modified date

One Year Ago

Today

All

Content type

News

Document

Report

How to

Video

SHOW MORE

CancerType

Breast Cancer

Colorectal Cancer

Other Cancer

Lung Cancer

Skin Cancer

SHOW MORE

Events and Programs

Relay For Life

cancer

Everything People News Resource Center Resource Center (Include Brand Toolkit)

Preference for results in English

Home

SocietySource

cancer.org ACS CAN Making Strides Against Breast Cancer Relay For Life Volunteer Learning Center ... © 2015 American Cancer Society ...

www.societysource.org

Employee Services

News And Views

Our Organization

Virtual Closet

My Society Source

MySocietySource

cancer.org ACS CAN Making Strides Against Breast Cancer Relay For Life Volunteer Learning Center ... © 2015 American Cancer Society, Inc. All Rights Reserved ...

www.mysocietysource.org

SiteFeedback

Terms of Use

American Cancer Society Partnerships Presentation

A customizable presentation for use with our partners or potential partners. Includes information about the Society and partnership opportunities like cause marketing, sponsorship, fundraising, licensing, and in-kind as well as some of our events, program

www.societysource.org/.../American%20Cancer%20Society%20Partnership…

Using LIVE CHAT for IT Support

Using LIVE CHAT for IT Support

www.societysource.org/.../Using%20LIVE%20CHAT.docx?action=default&D…

CoC Cancer Committee Presentation Working Together to Improve...

a member organization of the Commission on Cancer and supports the National Cancer Data Base and the Cancer Liaison Pro...

www.societysource.org/.../CoC%20Cancer%20Committee%20Presentation%2…

CoC Reporting Template Cancer Facts and Figures 2014

Colorectal cancer (CRC) is the third most common newly diagnosed cancer and the

Pictured: American Cancer Society Intranet: Search Results Page.

Search Highlights

- 1. Facets:** The site is built on SharePoint and uses SharePoint 2013 Enterprise search. The team used feedback from focus groups and stakeholders to help refine the facets that appear along the side of the page. Users can narrow their search by document type, modified date, content type, or cancer type, or search Relay for Life, the organization's primary fundraising event. Including cancer type and a key organizational event — rather than going with the standard search defaults — shows the attention to detail that makes this tool work for ACS.
- 2. Scope:** The search scope defaults to searching everything, but users can refine it by selecting the type of information and source they want to focus on, such as people, news, or the *Resource Center*, including the Brand Toolkit. The Brand Toolkit is a digital asset repository for all of the Society's branded materials, guidelines, and messaging tools, such as logos, photos, fact sheets, brochures, posters, print and web advertisements, videos, and more. This mimics the options in the open search field available on every other page of the site, where the scope defaults to the broadest search but users can utilize a drop-down to narrow their focus.
- 3. Results:** Results are specific to each user. Relevancy is based on the user's profile and their level of access to content, as well as on the enterprise taxonomy and IA. Monthly analytics are run to help adjust metatags to match user search terms.

Support for Content Creators

Home / Society Source Content Management

Society Source Content Management

Departments & Divisions

[ACS CAN](#)

[Corporate Communications](#)

[Enterprise Governance & Corporate Services](#)

[Field Operations](#)

- [California Division](#)
- [East Central Division](#)
- [Eastern Division](#)
- [Florida Division](#)
- [Great West Division](#)
- [High Plains Division](#)
- [Lakeshore Division](#)
- [Mid-South Division](#)
- [Midwest Division](#)
- [New England Division](#)
- [South Atlantic Division](#)

[Information Technology](#)

[Office of Chief Cancer Control Officer](#)

[Office of Chief Financial Officer](#)

[Office of Chief Medical Officer/Research](#)

[Office of Corporation Counsel](#)

[Office of President & Chief Operating Officer](#)

[Revenue & Marketing](#)

[Talent Strategy](#)

The Society at Your Fingertips

As site owners and content managers for Society Source, you are helping us work together in new and efficient ways. This page is devoted to you. As custodians of our dynamic, flexible, user-centric intranet dedicated to expediting enterprise-wide collaboration, you are helping staff and volunteers feel more connected to each other and to Society priorities, and re-shaping the Society's approach to internal communication and knowledge sharing.

Questions?

- Contact Anne Hartwick, Senior Consultant, Society Source, who can help you manage your content on Society Source.

Site Content Apps

Upload files to the Resource Center and Image libraries, and download HTML templates using these links.

- [Resource Center](#)
- [Resource Center Multimedia](#)
- [Images](#)
- [Content Editor Web Part Templates](#)

Society Source Tips

Become a Society Source champion and resource for other staff by becoming familiar with these resources.

- [Society Source, Brand Toolkit, Team Sites, Yammer - What Goes Where?](#)
- [Tour of Society Source](#)
- [SharePoint - Introduction to Society Source](#)
- [The Resource Center](#)
- [Search Tips](#)
- [Quick Links](#)

Job Aids

These resources will help you build and maintain your Society Source site, and populate Society Source with up-to-date, relevant and critical content.

Working in the Resource Center Libraries

- [Deleting Editing Replacing Files on Society Source Libraries](#)
- [Uploading Files to Resource Center Library](#)
- [Uploading Files to Resource Center Multimedia Library](#)

Building and Maintaining Sites

- [Adding and editing Announcements](#)
- [Adding and editing the Calendars](#)
- [Using HTML templates to customize Web Parts](#)
- [Using images in Society Source](#)

Team Site Resources

SharePoint team sites can help organize and energize collaboration in your Department or Division. These resources will walk you through the basics of designing, managing, and adding content and other apps to your team site.

- [SharePoint - Welcome to Team Sites Video Tour](#)
- [Introduction to Team Sites](#)
- [Frequently Asked Questions](#)
- [Admin Guide for Site Customization](#)
- [Admin Guide for Managing Permissions](#)
- [Admin Guide for Creating Lists](#)
- [Admin Guide for Discussion Board](#)

Pictured: American Cancer Society Intranet: Support for Content Creators.

Support for Content Creators Highlights

- 1. Resources:** Two hundred content contributors add information to the site, in addition to intranet team members and guest authors, who are encouraged to post information about specific campaigns and events. Contributors are trained in content posting and then supported by both a content management page (with information and job aids) and occasional training and community-building events. Contributors receive quarterly reports about expired documents and are asked to regularly review sites. In addition, each site page has a user feedback link.
- 2. Apps and Tips:** Contributors can quickly link to areas for uploading content and retrieve templates using links in the *Site Content Apps* area. *Society Source Tips* includes documents covering where to post content, how different site areas work, and tips for searches.
- 3. Job Aids and Team Site Resources:** In these sections, employees can find information about creating content in various site areas, including the basics of uploading, deleting, and managing information in the *Resource Center*. They can also view instructions for preparing content, such as for announcements and events, or creating specific pages. *Team Site Resources* provides information about creating collaborative areas based on the team or project. This area supports all types of content creation, from a simple file upload to customizing a team site.

Mobile Design



Pictured: American Cancer Society Intranet: Responsive Design for Mobile Viewing.

Mobile Design Highlights

- 1. Responsive Design:** The site uses responsive design via Twitter's Bootstrap Framework. Rather than targeting screen resolutions, the team aimed for a general phone and tablet experience. Although the framework makes the site available on mobile devices, the site is not yet optimized for mobile. The team plans to do further research and testing on the mobile experience moving forward. For now, simply having mobile access where none previously existed is an accomplishment.
- 2. Hamburger Menu:** The team used a hamburger menu to keep navigation available, but out of the way, on the mobile site.
- 3. Prioritizing Information:** The mobile view includes the news carousel, which highlights one of the desktop site's four news stories and offers links to the other three. Additional content areas wrap down the page in a two-column design.

DESIGN PROCESS AND USABILITY WORK

ACS's previous intranet, *The Link*, had become very unpopular and many staff had complained about its shortcomings. A survey was conducted to find out exactly where *The Link* was lacking, and the results were used to help make the case for a new intranet. Concurrently, ACS was also transforming into a single, centralized organization rather than having its divisions operate as separate entities. This offered the perfect opportunity to build the case for a new ACS intranet, which would be the one go-to place for news, information, and collaboration as the organization became a unified entity.

The ACS team brought in Neudesic, a user experience agency, to help find the best solutions to meet its many project needs. Together, the Neudesic and ACS teams conducted several research activities that helped inform their design choices, including:

- **Gathering feedback:** Neudesic followed an Agile approach that included a two-week discovery period. During that time, team members conducted surveys using ACS's internal Yammer tool, department stakeholder interviews, and a content inventory-based discovery, gathering feedback and deciding on the user experience based on *The Link's* existing content. The survey findings summarized department breakdowns, risk factors, and next steps.
- **Evaluating usage:** The team conducted surveys and consulted analytics data to find out which features and sites were most used.
- **Involving stakeholders:** The team interviewed stakeholders in each department to understand their needs. Through these interviews, team members discovered both the existing intranet areas that were most valuable to the organization (and therefore would be prioritized sooner in the migration process) and the pressing user needs for the new intranet. This research helped them prioritize the departments and content and decide on migration phases, starting with the most important and widely used content. It also helped team members decide which content was no longer important to either users or stakeholders and thus didn't need to be moved. This user research also informed the IA of the site.

The project plan was heavily informed by the research findings, which were particularly helpful in creating the IA. "Our research was helpful in uncovering a LOT of internal jargon in each department," says Melinda Baker, Director, Web Marketing. "We were able to use the lack of knowledge of this inside lingo to normalize the labels and language to be understandable by people outside of each department. Many departments assumed that everyone understood and knew what they did, and our research was able to show that wasn't the case. As a result, the UX team suggested labels that were more universally understood, as well as labels that bring things together into user tasks, not just departments.

"The best advice I can give for creating a helpful menu is to ensure you are supporting your users and not just creating silos for departments," she says. "Having a team that was dedicated to creating and supporting the intranet made this an easier task, as well as having a strong business owner who made decisions based on UX recommendations and user feedback.

"We pushed hard to ensure that the IA and site organization worked for users and wasn't just building a site structure that mapped to our department structure," says Baker. "That took a lot of work and discussion."

In the time leading up to Society Source's launch, the team implemented a big communications campaign to build momentum and generate excitement. In it, team members played up the poor functionality of the previous intranet and started to tout how the new intranet solved each of those issues. By launch date, staff members were excited about what they were going to see, and the team received lots of positive feedback on the new intranet via ACS's internal Yammer site.



Pictured: American Cancer Society Intranet: Old ACS Intranet. The Link as it appeared from approximately 2004 to 2013/14.

WORKING WITH OUTSIDE AGENCIES	
Agency	Project Role
Neudesic UX Team	<ul style="list-style-type: none"> • User research • Feature prioritization • IA and taxonomy; conducted card sorts with relevant user groups and so on • Wireframes and design concepts • Usability testing using proof-of-concept designs and prototypes
Neudesic Collaboration & Portals Team	<ul style="list-style-type: none"> • Configuration of enterprise taxonomy and IA • Custom development and integration of features • SharePoint search enhancements • Self-service model development and workflows for business process automation
Neudesic Managed Services	<ul style="list-style-type: none"> • On-going support (T1 and T2) • Enhancements and bug fixes

GOVERNANCE

Corporate Communications is the business owner of the corporate intranet; departmental leaders own the team sites and corresponding departmental content and collaboration.

The previous intranet had an IT-driven support system, which has now been replaced by a self-service and governance-driven support system facilitated by Corporate Communications and IT when needed.

INTRANET TEAM RESPONSIBILITIES	
Role	Responsibilities
Intranet Leadership Team	<ul style="list-style-type: none"> • Lead intranet governance model plan • Prioritize feature enhancements • Review usage analytics • Create and review content; lead by example • Lead adoption-focused events and webinars • Absorb and gather user feedback • Oversee usage guidelines, policies, and procedures • Oversee site structure, permissions, and branding • Oversee enhancements for site navigation and search • Update and maintain corporate taxonomy • Support service-level agreements between support teams (Neudesic and ACS IT) and business (ACS) and end users
Corporate Communications	<ul style="list-style-type: none"> • Create and review content; lead by example • Encourage participation in leadership blogs • Oversee Yammer communications and corporate news • Promote content from other information repositories to the intranet • Coordinate intranet author induction training
Departmental Content Owners	<ul style="list-style-type: none"> • Update and maintain departmental taxonomy • Create and review departmental content; lead by example • Control access and permissions for departmental content • Promote departmental content
Training & Support	<ul style="list-style-type: none"> • Oversee training and best practices coaching • Identify and train departmental leaders • Manage archiving and versioning • Organize content • Conduct “Train the Trainer” and “Ask the Expert” type events

URL AND ACCESS

ACCESS INFORMATION	
Item	Status
URL	<ul style="list-style-type: none"> https://www.societysource.org
Default Status	<ul style="list-style-type: none"> The intranet is set as the homepage for all users and bookmarked in their browsers.
Remote Access	<ul style="list-style-type: none"> Users can access the site remotely (when not on the corporate LAN).

TIMELINE

PROJECT MILESTONES	
Milestone Date	Milestone Description
2004	<ul style="list-style-type: none"> The organization's first intranet, Society Link (aka "The Link"), was launched
January–May 2013	<ul style="list-style-type: none"> New intranet vendor RFP process
May–July 2013	<ul style="list-style-type: none"> Phase 1: Requirements gathering, design, and planning
August–December 2013	<ul style="list-style-type: none"> Phase 2: Development of initial sites
December 6, 2013	<ul style="list-style-type: none"> Wave 1: Launched Society Source, including Corporate Communications, Talent Strategy, and IT departments
January–November 2014	<ul style="list-style-type: none"> Wave 2: Site development for remaining departments and divisions
November 2014	<ul style="list-style-type: none"> All departments and divisions launched
May 2015	<ul style="list-style-type: none"> Volunteer access granted with launch of My Society Source site (mysocietysource.org)

CONTENT AND CONTENT CONTRIBUTORS

CONTENT DEVELOPMENT AND OVERSIGHT	
Contributors	<ul style="list-style-type: none">Approximately 200 contributors support their department's presence on the intranet. Departments identify contributors based on their experience and their role in the organization.
Training	<ul style="list-style-type: none">The organization provides a portal page devoted to content management. The page is filled with information and job aids to help content managers and site owners manage their Society Source presence. Contributors are trained before being granted contributor permissions. Based on their role, they learn how to upload and update files in the document library, add and delete items in department announcement and calendar lists, and change out content editor web parts using HTML.
Maintaining Quality	<ul style="list-style-type: none">The internal communications team in Corporate Communications works with their department clients to periodically review sites and update content.Contributors are asked to review their sites regularly and receive a report on expired documents each quarter.Users can provide site feedback by clicking on a link in the footer on each portal page. User feedback makes team members aware of stale, outdated content or site areas that might not be functioning properly.

Content Guidelines

ACS developed a set of content guidelines to support the vision and ongoing development of the SharePoint intranet in a strategic and consistent manner. These guidelines highlight the best practices that all users and site designers should understand and follow to ensure SharePoint's success; the guidelines include the following directives:

- **Be user-centric:** The quality of the user experience is critical to SharePoint's success. The site is based on employees' needs and designed to address behavioral barriers. Users can access local news and resources and decide which content to follow based on their changing needs. Site structure is built around user communities (such as everyone who works in Talent Strategy or everyone in the Florida Division).
- **Create a collaborative culture:** User platform adoption is fostered by building a collaborative culture in which spontaneous interactions help drive the nonlinear growth of SharePoint's value. Successes are communicated through user stories that not only showcase SharePoint solutions, but also showcase the people who helped create them. Users are encouraged to share their knowledge, content, tips, and tricks so that training becomes a continuous activity in the core culture. "SharePoint champions" within business teams also help drive SharePoint into the business.
- **Support findability:** SharePoint's foundation is in connecting people with the right content, at the right time, in the right place, in a way that is simple and intuitive. This is accomplished, in part, by a well-defined taxonomy and metadata elements that help drive search relevance. Content in SharePoint is tagged using a list of tags common across the enterprise, which creates a shared framework that enables navigation across many sites.
- **Have business ownership:** Managing SharePoint content is a business imperative. Technology is accountable for availability, performance, and feature set. However, each content item in the system should have an easily identifiable business owner, and all business owners must understand the update, security, and retention needs of the data they publish. When people leave the company, ownership is transferred, preserving long-term accountability.
- **Present one version of the truth:** Only one authoritative source for enterprise content exists. Duplication should be avoided. Email, IM, and other communications should link to the definitive content item.
- **Support a least-privileged access model:** The ACS security model is based on least-privileged access to create a more secure environment that is relatively easy to support. Users have permissions to support the job functions they need to perform, but are not burdened with extra buttons, which can create support issues. As much as possible, sites, subsites, lists, and libraries are arranged to share most permissions. Sensitive data is separated into privileged lists, libraries, or subsites.
- **Create for reuse:** The SharePoint intranet uses templates for sites and pages to leverage a standard set of features and tools that offer users a consistent look and feel across the entire intranet. This template approach also helps save time and effort down the road, as well as improves adoption rates.

- **Encourage self-governance and accountability:** Site owners and users are empowered to maintain and account for the integrity of content and interactions on the site, rather than have the enterprise impose and police a set of rules.

Culling Content

In the first phase of the site development process, content contributors were asked to inventory their content. This was a manual process in which contributors categorized their content by audience to determine the appropriate data storage location. Content identified as relevant for the entire enterprise was moved to the new intranet portal and the appropriate metadata was applied. Old content was deleted or archived. Content that was relevant only to specific teams or departments was placed in file shares or SharePoint team sites.

ACS had an internal project manager exclusively devoted to tracking each department's progress through this process, which was critical to keeping it moving along. "Without this constant monitoring, the project would have lagged and faltered," says Hadsock. "Many of our contributors have a full portfolio of work already, and their responsibilities to site development were added onto already full plates."

The project manager's job was to allow enough time for each site development phase — content inventory, content mapping, gap identification, site content development, site training, site building, site testing and refinement, and site launch — while also holding staff members accountable to the timelines. This work was critical to the new intranet's success.

TECHNOLOGY

TECHNOLOGY	
Category	Technology Used
Web Server Hardware and Operating System	<ul style="list-style-type: none"> • Processor: 64-bit, 4 cores • RAM: Web Front End (WFE) server in a three-tier farm (16 GB) • Hard disk: 80 GB free for system drive, 50 GB D drive, 150 GB E drive; maintain 2x free space as available RAM
App Server	<ul style="list-style-type: none"> • Processor: 64-bit, 4 cores • RAM: App server in a three-tier farm–16GB hard disk; 80 GB free for system drive, 50 GB D drive, 150 GB E drive; maintain 2x free space as available RAM
DB Server	<ul style="list-style-type: none"> • Processor: 64-bit, 2x8 cores (16 cores) for medium deployments • RAM: 16 GB for medium deployments • Overall RAM: 128 GB • Hard disk: 450 GB free for system drive
Web & Application Servers Software Requirements	<ul style="list-style-type: none"> • Web Server (IIS) role • Application Server role(s) Microsoft .NET Framework 4.5 Microsoft Information Protection and Control Client (MSIPC) • Windows Identity Foundation .0 and WIF Extensions, SQL Native Client 2008 R2 SP1, Sync Framework .0 SP1 • Windows Server AppFabric (Velocity) + CU1 (KB2671763), WCF Data Services 5.0 (ODataLib – Open Data Library), Windows PowerShell 3.0
Database Servers and Software Requirements	<ul style="list-style-type: none"> • Microsoft SQL Server 2012 Enterprise Edition

	<ul style="list-style-type: none"> • Office 2010 or Office 2013 for full offline/integrated experience • SharePoint Designer: SharePoint Designer 2010 works only for 2010 mode sites; SharePoint Designer 2013 works for both 2010 and 2013 mode sites. • SharePoint Workspace: SharePoint Workspace 2010 works for 2010 mode ("14 mode") sites; SharePoint Workspace 2013 introduces new SkyDrive Pro to replace SharePoint Workspace 2010 as part of the Office client installation).
Bug Tracking/Quality Assurance	<ul style="list-style-type: none"> • Microsoft Visual Studio, Team Foundation Server (TFS)
Design Tools	<ul style="list-style-type: none"> • Photoshop, OmniGraffle, MindNode Pro
Site Building Tools	<ul style="list-style-type: none"> • Neudesic migration framework to move content from Plumtree; SharePoint designer and SharePoint CMS to build the site
Content Management Tools	<ul style="list-style-type: none"> • SharePoint 2013
Search	<ul style="list-style-type: none"> • SharePoint 2013

RESULTS AND ROI

ACS didn't have a financial target; instead, it focused on replacing an antiquated solution with a more modern intranet that better met the needs of staff and volunteers. However, the new intranet did have associated cost savings: ACS was able to cut the number of servers and server-associated costs by 62%.

Measuring Performance

ACS uses Google Analytics to prioritize enhancements; measure employee adoption rates; and improve search, training, and support. The organization also produces a monthly dashboard to monitor site usage (including session duration, pages per session, pages visited, and news items accessed), trends, and search usage. Monitoring these metrics lets the team identify trending topics and make adjustments to metadata tags to better match user search terms. The dashboard also identifies key content areas that need further promotion and training to ensure staff can easily find what they are looking for.

Society Source: Top 10 Pages by Views

Page	May	June
Society Mart	22,461	16,391
Cancer Resource Connection	8,155	9,673
Society Jobs	8,691	7,612
Resource Center	3,785	3,355
Access: Learning	3,191	3,148
Society Benefits	2,944	2,434
iTravel	2,350	2,055
IT For Me	2,072	1,874
Society News	1,642	1,487
Manager Resources	1,661	1,467

Pictured: An example of Google Analytics results for the ACS intranet for May and June 2015.

Society Source: Trending Search Terms

April			May			June		
Search Term	Total Unique Searches	% Total Unique Searches	Search Term	Total Unique Searches	% Total Unique Searches	Search Term	Total Unique Searches	% Total Unique Searches
1. society mart	237	1.34%	1. procedures	246	1.56%	1. holiday schedule	339	2.02%
2. employee handbook	177	1.00%	2. society mart	179	1.14%	2. procedures	273	1.62%
3. procedures	134	0.76%	3. employee handbook	158	1.00%	3. employee handbook	217	1.29%
4. national volunteer week	120	0.68%	4. employee advantages	156	0.99%	4. society mart	118	0.70%
5. brand toolkit	82	0.46%	5. ncic procedures	90	0.57%	5. where the money goes	117	0.70%
6. sharepoint	80	0.45%	6. sharepoint	88	0.56%	6. org chart	112	0.67%
7. esam	77	0.44%	7. brand toolkit	83	0.53%	7. ncic procedures	100	0.59%
8. ittravel	76	0.43%	8. esam	65	0.41%	8. esam	87	0.52%
9. position roster	76	0.43%	9. eprf	62	0.39%	9. sharepoint	84	0.50%
10. gary reedy	75	0.42%	10. you decide	59	0.37%	10. you decide	66	0.39%

Pictured: Google Analytics results for trending search terms for April–June 2015. ACS uses these metrics to adjust metadata terms and thereby ensure intranet users get quick access to what they are looking for.

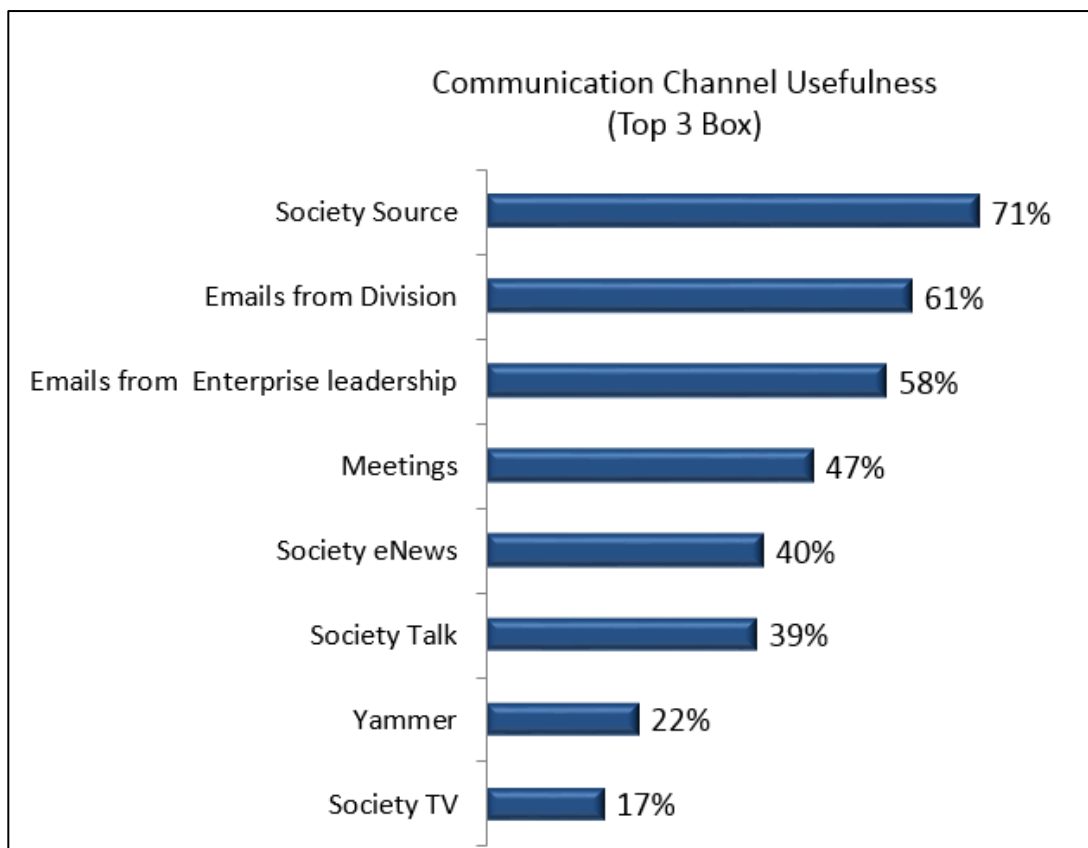
Measuring Satisfaction

Many intranet teams measure user satisfaction to ensure that the site meets employees' expectations and thus help ensure that they'll engage with it. On the previous ACS intranet (The Link), satisfaction ratings on overall functionality,

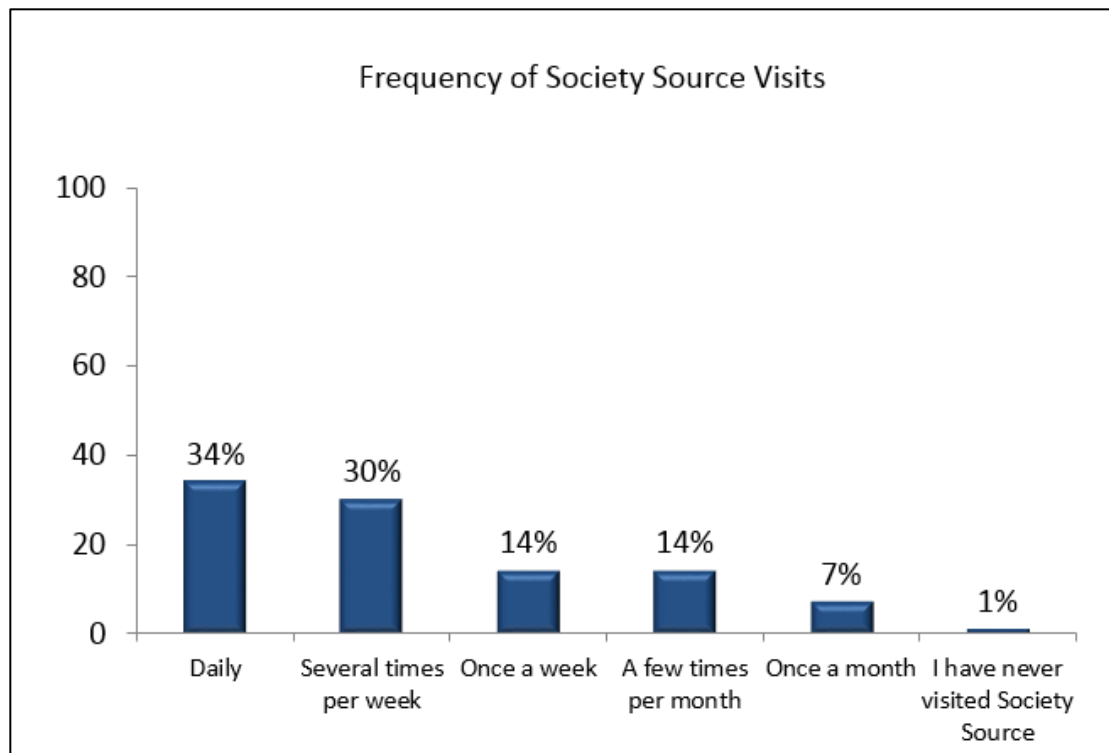
professional appearance, and intuitive design all fell below the top-three average ratings on the 10-point satisfaction scale. The Link's "intuitive design" scores were the lowest, and its lack of intuitive design was the subject of a majority of the open-ended complaints. This low rating helped drive the redesign effort.

Following the new intranet's launch, the ACS conducted a survey with all staff members aimed at better understanding their communications preferences and how they were currently consuming information. On that survey, staff members ranked the new intranet as the most useful communication channel out of the eight channels used for internal communications; the results indicate that staff members view Society Source as the go-to source for news and information, and a place that offers quick and easy access to other tools they need to do their jobs.

On the survey, 71% of staff rated the intranet the most useful communications channel. Results also showed that 64% of staff used Society Source either daily or several times per week.



Pictured: A post-launch survey revealed that the new ACS intranet is considered the most useful communication channel at the organization.



Pictured: A post-launch survey revealed that the new intranet is one of ACS's most-used information resources, with 64% of the staff using Society Source either daily or at least several times per week.

LESSONS LEARNED

The ACS team shares a few of the key lessons learned from the intranet redesign process:

- The discovery phase is critical.** "The biggest problem on most projects is the discovery. I think we learned that it was critical to increase communication between the design and delivery teams and the end users and business stakeholders. In order to align the delivery team with the expectations of the ideation process, we went through a lot of prioritization cycles. We had scope and development expectation challenges when stakeholders, end users, and delivery groups were not aligned."
- Focus on quality rather than quantity.** "Set a clear expectation of what is in scope and not in scope — but be flexible. Don't boil the ocean with features that half work. Users would rather be limited to five features that work really well than 10 that don't."
- Design to define.** "The more you can ideate as a group on a whiteboard or sketching, the leaner your design process will be. I think most design teams want to dive into the details too early, before they have defined what they are solving."

Goodwill Industries International, Inc. (2017)

OVERVIEW

COMPANY

Goodwill® is a social enterprise with a proven commitment to a triple bottom line: each year, its \$5 billion USD donated goods retail infrastructure funds career services for 37 million people (two million in person and 35 million virtually) and results in positive social and environmental outcomes for the global community.

Headquarters: Rockville, Maryland. Goodwill Industries International (GII) is composed of independent member organizations; the Rockville office provides services and benefits that help advance the GII mission and businesses.

Company locations: Goodwill has 164 independent, community-based organizations across the US and Canada, and has a presence in 13 other countries.

Locations where people use the intranet:

Employees at Goodwill organizations in the US, Canada, South Korea, Finland, and Brazil use the intranet. The Goodwill enterprise is geographically diverse, having a presence in all 50 states and four Canadian provinces. Goodwill organizations also vary in territory size, number of staff, services, and available resources.

Annual revenue: Sales revenue was approximately \$4.1 billion and total revenue was \$5.5 billion in 2015 (USD).

THE INTRANET

Users: Approximately 9,500 Goodwill employees are registered users, primarily at the management and executive levels. These employees use the site to access and share resources, best practices, templates, and learning opportunities, as well as to find directory information about locations and employees. The intranet holds special value for small- to medium-sized Goodwills that rely on the site's tools and templates to supplement what they can achieve with local resources.

Mobile approach: Mobile accessible

Technology platform: SharePoint 2010

TEAM

The team: A team of approximately 14 people contributed to the site's design and development, including front-end, IA and graphic design, back-end development and architecture, business taxonomy, and content.

Leadership: Arlene McCrehan, Senior Director of Digital Media; Jerry Callistein, Director of Information Systems; Beth Perell, VP of Communications and Information Management; David Downes, VP Information Technology

Design (Creative Services): Arlene McCrehan, GII Senior Director of Online Media; Rachel Mundstock, Project Manager, Threespot; Meryl Pritchard, Graphic Design, Threespot; Gordon Withers, Lead Front-End Development, Threespot

Development: Chirag Patel, GII Senior Developer; Jerry Callistein, GII IT Systems Director; Sam Torian and Will Thomas, Protiviti

Taxonomy: Jenni Baker, GII Online Content Program Manager; Mark Leher, COO, WAND, Inc.; Mike Doane, Senior Consultant, WAND, Inc.

Content and Communities: Maggie Swearingen and John Elam, Protiviti; Jenni Baker, GII Online Content Program Manager

INTRANET TEAM



Team members shown here (back row, left to right): Joe Shaw, Ben Herring, Sarah Newhard, Teresa Weller, Arlene McCrehan, Jenni Baker, and Chirag Patel. (front row, left to right): Beth Perell and Jerry Callistein.

HIGHLIGHTS ABOUT THIS WINNER

Starting from an original site made up of 130 communities and a user-generated taxonomy that had expanded to include 13,000 terms (complete with typographical errors and redundancies), the 14-person Goodwill intranet team set out to create a user-focused site that made information easy to find.

The team worked to streamline site content, create a new taxonomy, improve search, and build a governance structure to support the 9,500 users of the intranet, which is used to help bridge geographic and organizational differences throughout the network. The site communicates both from the enterprise to individual Goodwill locations — which vary widely in size, location, and number of staff — and from employee to employee across the diverse locations.

- **New taxonomy.** Goodwill's previous site content was tagged with 13,000 terms, some of which were spelled incorrectly or duplicated. The team started from scratch, creating a taxonomy of more than 1,000 terms, customized to the organization's vocabulary. The team trained more than 50 team members on how to apply the new terms to content and made content easier to find via navigation as well as search.

- **Emphasis on search.** In conducting user research, the team heard the common complaint that information was simply too hard to locate. In response, team members worked to improve the efficiency and effectiveness of the search tool. They also decided to put the search tool front and center in the new design, encouraging users to try it as an improved way to find information. The placement reflects the team's confidence in the improvements it made to search.
- **Author support.** Site owners and managers create content throughout the site. The intranet team supports the authors with guides for writing and for selecting photos, and through regularly scheduled training opportunities. A monthly brown bag series included training and a facilitated discussion on writing ideas, creating editorial calendars, and promoting content. Further, the team emphasizes that posting content shouldn't be seen as a job task, but as an opportunity to hone writing skills and to position the author as an SME within Goodwill.
- **Governance.** Previously, intranet governance was not well defined. The redesign was an opportunity for cross-team collaboration, starting with a core team from IT and Digital and Knowledge Management. The team's next challenge is to create a living governance document to use moving forward for maintenance and future planning.
- **SharePoint.** With the exception of one member, the team was unfamiliar with the nuances of SharePoint terminology at the start of the project. A miscommunication with a vendor resulted in a delay, and necessitated switching vendors to finish the project. Many of the team members were learning SharePoint while they were building out sites.

BACKGROUND

Goodwill Industries International (GII) is the member services office for the Goodwill enterprise and offers local Goodwills various benefits to enhance their programs and services and grow their organizations. Goodwill's corporate intranet, MyGoodwill, is one of these benefits.

The Goodwill enterprise is geographically diverse, with a presence in all 50 states and four Canadian provinces. Goodwill's 164 organizations also vary in territory size, number of staff, services, and available resources. MyGoodwill plays an important role in bridging these geographic and organizational differences, establishing an online destination for Goodwill staff members to convene, share best practices, and request input from their peers at other Goodwill locations. The intranet holds special value for small-to-medium-sized Goodwills, which rely on the site's tools and templates to supplement what they can achieve with local resources.

MyGoodwill supports users working in multiple organizational areas. Disciplines with the highest percentage of staff members represented include workforce development (35%), donated goods and retail (22%), administration (11%), HR (9%), finance (7%), and marketing and communications (5%). Users at multiple career levels access MyGoodwill; groups with the highest representation include managers (33%), specialists (25%), and directors (18%).

The existing MyGoodwill, which was built on the open-source Alfresco CMS, was six years old when the new site launched. Two years after the initial site's launch, leadership made a commitment to move all of the organization's systems to Microsoft platforms to consolidate staff expertise and strengthen overall security. During the transition, member organizations voiced dissatisfaction with the old site.

The site had grown popular, and with that popularity came lots of participation. This might seem like a good problem to have, but the organization paid a price for that growth. The number of communities had grown to nearly 130, making navigation a challenge for users. Because the intranet team let users create tags, the folksonomy had grown to more than 13,000 terms, replete with typos and redundancies. Content and documents were outdated. Search was bogged down, and search results were difficult for users to parse.

With all of this in mind, the redesign team's primary goal was to improve search and navigation, and create a more contemporary look and feel that would help the organization re-engage its users.



Pictured: Goodwill Intranet Old Homepage.

Challenges

Arlene McCrehan, Senior Director of Digital Media, outlines some of the major challenges the team faced during this project:

- **Learning SharePoint on the fly.** “One of our significant challenges is that most of us had to learn SharePoint as we were planning and building it. At the time we decided to move to SharePoint, our Rockville team began learning the technology and working in the out-of-the-box team sites that were set up. Trainings were held; however, teams were slow to adopt without a compelling rationale. The more robust features of SharePoint weren’t leveraged with these sites, however, and our team leaned heavily on our one in-house SharePoint expert to educate and lead us through the strategic uses of these features for our new MyGoodwill site. As we brought vendors into this redesign process, our Power User knowledge base was further strengthened.”
- **Managing cross-team collaboration.** “Our governance structure was not solidified with our previous site, so cross-team collaboration needed to be strengthened at the outset. We established a core governance team, consisting of leads from IT and Digital and Knowledge Management, and laid out a framework for decision-making and Agile development through JIRA. We hold weekly governance and monthly sprint planning meetings, and we have resolved many of our collaboration difficulties. However, we have yet to create a living governance document that can serve as a reference going forward. This will be a goal for the remainder of 2016.”
- **Creating clear scope of work boundaries when engaging outside resources.** “The nuances of SharePoint-specific terminology in the process of outlining our statement of work for the design vendor led to another challenge during the project. We had understood that our design vendor would deliver files that we could immediately implement on our site — that is, in SharePoint format. However, our vendor’s understanding was that they would not be doing the implementation and were not responsible for the SharePoint formatting. We quickly turned to another vendor we were working with on the site’s infrastructure to format the files and implement them on the site; however, we lost three months as a result.”

Taking a Customers-First Approach

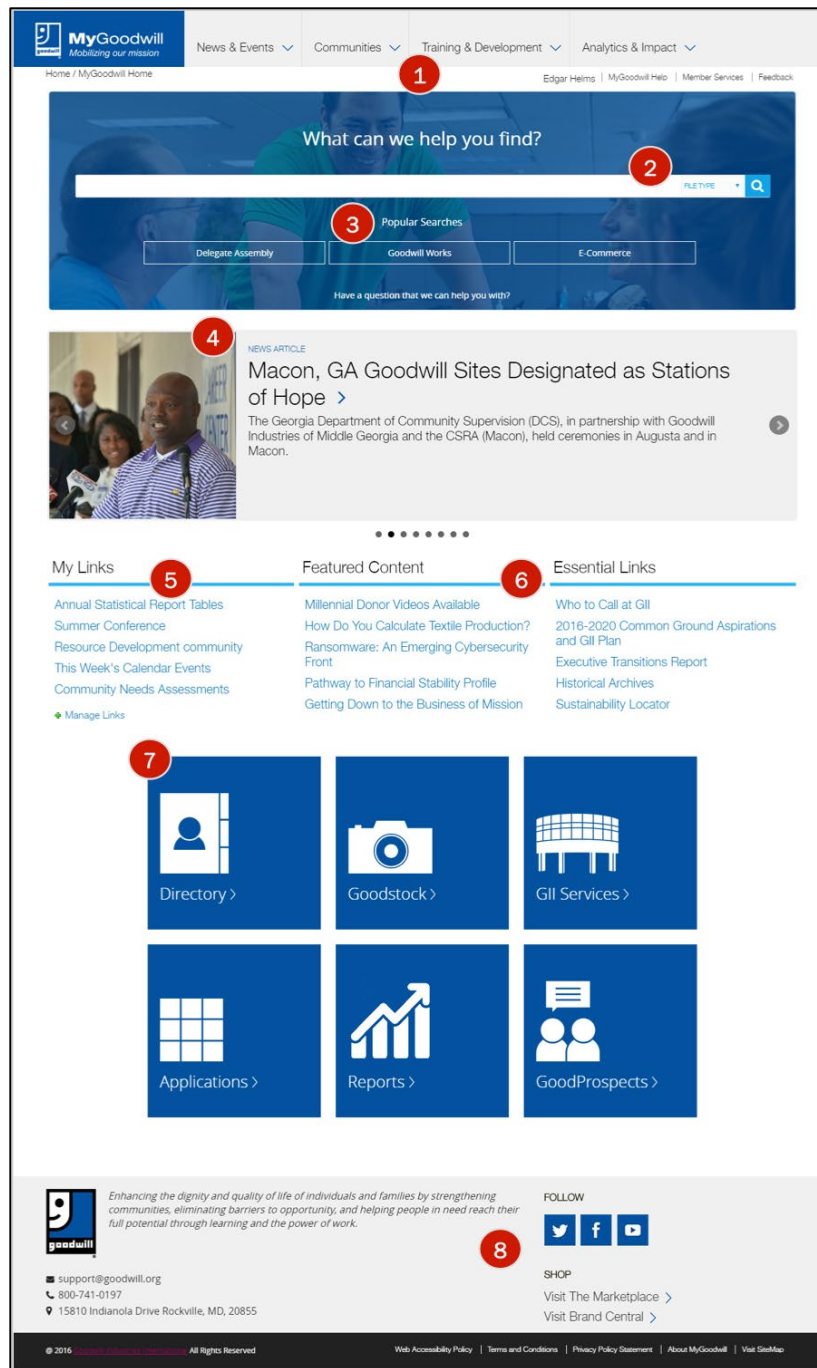
As mentioned above, users expressed frustration with the existing site, which was clogged with outdated content and deep navigation. GII staff members frequently received calls and emails requesting documents that users could not find on the site. The site had also earned a less than stellar reputation among member organization CEOs and executives; although they comprise a small percentage of users, they are very influential regarding intranet use.

Because GII considers the intranet a service it offers member organizations, it adopted an intense, customer-first mindset in approaching the site redesign. One of the first steps was to use Google Analytics to examine the current usage patterns. GII’s redesign team wanted to discover which new features users might want on the

new platform, as well as which features might help them do their work. The team therefore conducted a survey across the entire user base, segmenting audiences by areas of professional expertise and organizational levels. Survey respondents were also asked if they would like to continue contributing to the redesign by participating in focus groups. During the design process, the team held focus group sessions with these volunteers, as well as with CEOs of member Goodwills who had expressed interest.

DESIGN REVIEW

Homepage



Pictured: Goodwill Intranet New Homepage.

Homepage Highlights

- 1. Navigation.** The site's global navigation includes four categories: *News & Events*, *Communities*, *Training & Development*, and *Analytics & Impact*. The team put the navigational categories through user testing to ensure that they reflected how employees thought about content. Of the four initial categories put through click testing, the team found two did not match users' mental model of the content. The team then renamed one category and replaced another to arrive at the final design's four categories.
- 2. Search.** The team decided to put search front and center in the design. The top of the homepage is focused on search, with the large heading *What can we help you find?* This is followed by an open text field for user queries; the field is wide enough to accommodate even the longest of search terms. Users can select a file type (document, presentation, image, or audio/video) or bypass that filter and move straight to submitting their query via the magnifying glass icon.
- 3. Popular searches.** To give users even faster access to what they need to find, the team lists three popular searches beneath the main search box. This list of popular searches is based in part on analytics, but it is also used to proactively promote content to users. For instance, the team uses this area to provide quick access to information that's important at different times of the year. For example, in June, July, and August, the team will add a link to "summer conference" to the list of popular searches as they know users are often looking for that information at that time.
- 4. Carousel.** A news carousel features several pieces of content. Users can navigate the carousel via arrows on either side of the content area or use the dots below the carousel. The carousel automatically rotates; the team slowed the rotation speed based on user feedback in early testing. News items are updated three to five times a week and focus on information of interest to the Goodwill enterprise.
- 5. My Links.** Users can create a list of links to content of interest. The *My Links* title makes the section's purpose clear, while the *Manage Links* link makes it easy for users to understand that they can change those links.
- 6. Featured Content and Essential Links.** *Featured Content* surfaces additional valuable resources for users, while *Essential Links* gives users access to information that the organization sees as a priority, including contact information, organizational planning, sustainability, and history information.
- 7. Blue tiles.** Throughout the site, blue tiles highlight important content. On the homepage, these tiles link to the employee *Directory*, *Goodstock* (Goodwill's proprietary stock photography website with images from national and international Goodwill locations), *GII Services*, *Applications*, *Reports*, and *GoodProspects®* (a public site for career navigators). When users hover over the tiles, the icons slide up to display a short description of the destination link. Throughout the site,

blue tiles give users quick access to key applications and content in areas where the site structure is deep.

- 8. Footer.** The page footer provides contact information and links to Goodwill's presence on Twitter, Facebook, and YouTube, as well as links to *Visit The Marketplace* and *Visit Brand Central* (sites for Goodwill vendor listings and branded merchandise, respectively).

Communities

The screenshot shows the 'Communities' landing page of the Goodwill Intranet. At the top is a navigation bar with the 'MyGoodwill' logo and links for 'News & Events', 'Communities' (marked with a red circle 1), 'Training & Development', and 'Analytics & Impact'. Below the navigation bar is a search bar and a breadcrumb trail: 'Home / Communities'. The main heading is 'Communities', followed by the tagline 'A place for Goodwill professionals to stay up-to-date, access resources and exchange ideas.' A 'FEATURED COMMUNITIES' section highlights the 'Finance Community' with a description: 'Investigate accounting, finance, tax and capital development topics that support and grow our Goodwill business lines.' Below this are three community categories: 'Information Technology', 'Strategic Planning', and 'Mission Advancement', each with a brief description. A 'Full Communities List' section (marked with a red circle 3) displays a grid of 15 community links: Associations, Awards, Business Services, Conference of Executives, Donated Goods Retail, Financial Services, GII Governance, Global Community, Government Relations, Halloween, Human Resources, Information Technology, Loss Prevention And Safety, Marketing And Communications, Mission Advancement, Organizational Strengthening, Resource Development, and Sustainability. A 'Questions about Goodwill Communities?' section (marked with a red circle 4) provides contact information for Ariene McCrehan, Senior Director of Online Media. The footer includes the Goodwill logo, mission statement, contact details (support@goodwill.org, 800-741-0197, 15810 Indianola Drive Rockville, MD, 20855), social media links (Twitter, Facebook, YouTube, LinkedIn), and a 'SHOP' section with links to 'Visit The Marketplace' and 'Visit Brand Central'. Copyright information for 2016 and various policy links are also present.

Pictured: Goodwill Intranet Communities Landing Page.

Communities Highlights

- 1. Look and feel.** Throughout the site, pages make good use of white space and imagery. One of the goals of the redesign was to have a

modern look and feel to help engage users. The previous design was dense with links and text; the new design is a welcome change.

- 2. Photography.** The team provides content owners with guidelines specific to selecting photographs. Goodwill has the benefit of having a proprietary stock photography website filled with meaningful images from Goodwill locations and this results in the site being filled with meaningful images of real Goodwill employees, volunteers, and people served by the organization. The availability of these photographs helps reflect the organization's people-centered approach.
- 3. Organization.** The previous intranet included 130 communities, which appeared in an alphabetical list with no nesting or hierarchy. The new site has pared down the communities to 25 and groups them by discipline. Users can browse featured communities at the top of the *Communities* landing page or navigate via community type via a list at the bottom of the page.
- 4. Contact information.** Anyone with questions about communities is invited to contact the individual listed.

Search Highlights

1. **Query.** The user's search query is repeated at the top of the results page, making it easy to see the term and edit it if needed.
2. **Facets.** The side of the page lets users narrow their options by result type, site, modified date, and item type. Further, users can choose specific tags from the site's taxonomy, limiting results to only content tagged with those terms. Each piece of content on the site requires at least two tags — one item type and one universal term.
3. **Results.** Search results include a document-type icon, the result title, and a brief blurb that includes the content authors, date posted, and file size, as appropriate. The team set a goal of no more than three refinements before the user could easily select the needed resource from the narrowed set. The content staff is carefully trained on the new site taxonomy to help surface the right results for a given query. Tags also impact how content is displayed on the site, giving content owners a strong incentive to apply tags accurately.

Content Page

The screenshot shows the 'MyGoodwill' intranet community page for Human Resources. The page has a top navigation bar with links like 'News & Events', 'Communities', 'Training & Development', and 'Analytics & Impact'. Below the navigation bar is a search bar and a 'What can we help you find?' prompt. The main content area is titled 'Human Resources' and features a large photo of four employees. Below the photo is a 'Welcome to the Human Resources Community' message. The page is divided into several sections: 'Articles' on the left, 'Featured Articles' in the center, and 'Ask the Community' at the bottom. The 'Featured Articles' section includes three articles: 'EEOC Announces Revised EEO-1 Rule', 'Overview of the FLSA Overtime Exemption Rule', and 'Three Americans with Disabilities Act Myths'. The 'Ask the Community' section has a 'Have a question to ask or idea to share?' prompt. The bottom of the page includes a 'Questions about this community?' section with contact information for Margaret O'Brien, Senior Director of Accreditation and Organizational Assessment. The page also features a footer with the MyGoodwill logo, contact information, and social media links.

1. Search bar

2. Human Resources header

3. Featured Articles section

4. EEOC Announces Revised EEO-1 Rule article

5. Ask the Community section

6. HR Alerts section

7. Pay & Benefits Links section

Practice: Goodwill Intranet Community Page.
Example of a Goodwill intranet community
that uses a page template

layout.

Content Page Highlights

- 1. Templated layouts.** The site uses templates to ensure consistency on content pages. Content owners can select from a few variations, such as moving images to the left or the right.
- 2. Consistent search.** Search is emphasized on the homepage, but is also available throughout the site. On interior pages, search moves to the top of the page, beneath the main site navigation.
- 3. Quickstart menus.** The left side of content pages includes quickstart menus, which give easy access to deeper information.
- 4. Articles.** Each article is accompanied by an image, and the headline is followed by a brief blurb of content. The site includes commenting and rating features for all articles.
- 5. Ask the Community.** Forums allow employees across local Goodwill locations to connect with one another and share ideas. Forums are also used to extend conversations from in-person meetings, such as at conferences and learning labs. The forums take the place of the listservs — which were previously used for such discussions — and help ensure that knowledge and best practices are captured so users can find information they need without having to ask again.
- 6. Contact and alerts.** The bottom of the page includes contact information, as well as a way to sign up to receive alerts when new content is posted to a community. This helps keep users informed about the latest changes.
- 7. Links and announcements.** The bottom of the page also includes important announcements and highlighted links to key content areas, such as newly released regulations and guidelines, external resources, and cross-references to relevant content in other communities.

DESIGN PROCESS AND USABILITY WORK

Site Usage Analysis

The design team approached its research and design activities from several angles. The first was site usage. GII conducted a critical analysis of site usage based on current year statistics from Google Analytics and information about users from the company's internal CRM database. Specifically, the team analyzed the following areas to inform its design decisions:

- **User career levels.** This analysis confirmed that the primary users were mid-career individuals who worked out of an office, rather than in a retail store or donation center.
- **User primary career area.** Team members wanted to understand the makeup of core users so they could prominently feature content accordingly. The analysis confirmed that more than half of the users work in retail and workforce development areas.
- **Page views by content and topic areas:** Using Google Analytics, the team segmented page views by content and topic areas to understand what was most valuable to users. "Learning" and "data and reports" surfaced as the top areas.

User Survey Results

With knowledge of user behavior in hand, team members designed a survey to confirm their understanding of user preferences and to see how people responded to additional opportunities for possible features, including for the corporate intranet. Nearly 400 local Goodwill staff members responded to the survey (the questions and response rankings appear below).

The survey segmented respondents according to their professional areas to provide weight to the team's design decisions, as the goal was to satisfy the largest body of users. One surprising finding was how tepid users were to the suggestion of a Facebook-style social feature. This shouldn't have been a big surprise; a 2014 capstone project survey of Goodwill employees conducted by Goodwill's Senior Leader program revealed that time constraints were a leading inhibitor for employee participation on MyGoodwill. However, given the popularity of social tools, it was still an unexpected finding. Users who responded to the survey indicated that they wanted to find resources quickly, and then get back to their jobs.

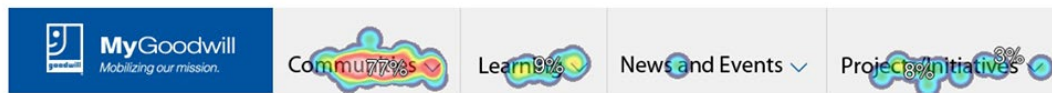
Respondents indicated that they expected the intranet to provide easy access to the specific content they're looking for: tools and templates to help them do their job, data and research, and learning and professional development opportunities. Users also ranked their top tasks on the site, with the top 10 tasks breaking down as follows:

TOP INTRANET TASKS Identified Through User Survey Results	
Ranking	Task
1	Search for content on a specific topic
2	Access a specific document
3	Access links to resources in my professional area
4	Find contact info
5	Access templates that help me do my job
6	Access toolkits that help me do my job
7	Find a best practice or case study on a particular topic
8	Register for a training/professional development opportunity
9	Participate in or access a webinar
10	Ask an experienced person a question on a specific topic

This list of tasks helped inform the initial top-level navigation elements that the team would later test against user expectations. In January 2016, the design team conducted first-click testing with approximately 100 users to test a proposed top-level navigation and corresponding IA for the new intranet. Chalkmark, a tool offered by Optimal Workshop, was used as the testing tool.

The tool presented users with the four menu items originally proposed for the top-level navigation, along with a series of 30 tasks. Users were asked to click on the menu item they would choose first to complete each task. This research revealed that two of the proposed navigation items did not match users' mental models, leading one to be renamed and another to be replaced altogether.

Task 2. Get advice from a Goodwill peer about store displays



Task 6. Get info about Summer Conference



Task 21. Find a webinar on a calendar



Pictured: Three different Goodwill intranet heat maps produced by conducting first-click testing on the proposed navigation for the new Goodwill intranet. The design team used Optimal Workshop's Chalkmark tool to generate these heat maps. The colored areas highlight the density and frequency of clicks for each navigation item.

Other Research Methods

To inform its remaining design decisions, the team relied on other research:

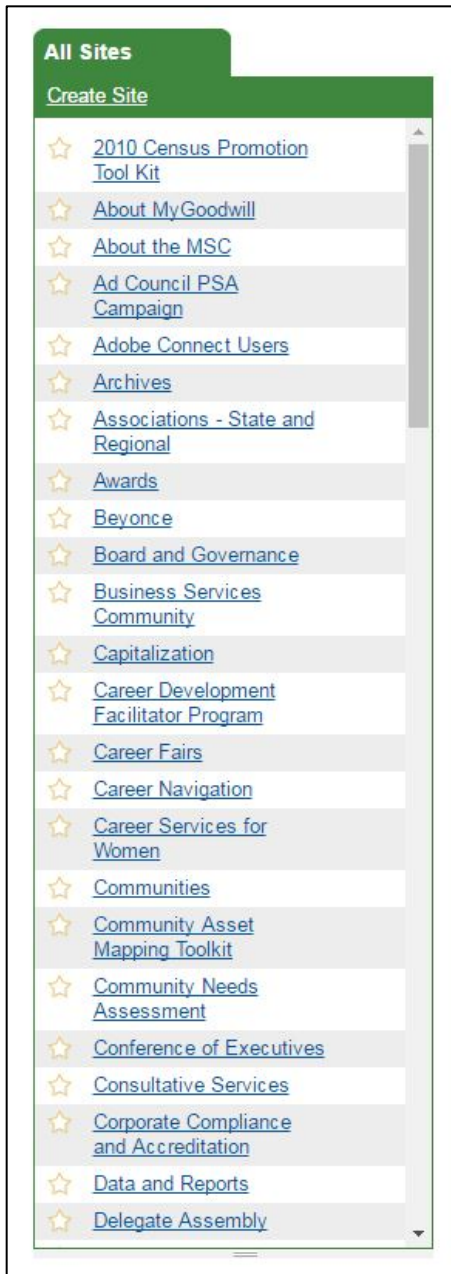
- **NN/g Intranet Design Annual.** GII team members purchased NN/g's Intranet Design Annual 2014 and reviewed comparable organizations and the technology, methods, and vendors they used. The team ultimately selected one of the vendors used by a 2014 Design Annual winner.
- **Search best practices.** A 2015 J. Boye conference presentation on search best practices, "Empowering Search to Drive Intranet Adoption," provided ideas for improving search options for users.
- **Online focus groups.** Along with its agency partner Threespot, the team conducted online focus groups so that users could respond to and provide input on the initial designs. Participants generally responded positively to the new designs, but were somewhat confused by an "Explore" page design, which was intended to specifically address findability issues from the past. Users didn't understand how the page was unique from an advanced search. Given these findings, the team ultimately chose not to implement the "Explore" page design.

- **IA labeling exercise.** While the company’s developers were implementing the SharePoint templates, the design team conducted an exercise to refine the labels for the main navigation using Optimal Sort’s Chalkmark. The team found this exercise particularly helpful for understanding how users interpreted “Learning” as a navigation element. This term had become a catchall for many types of training resources, so they applied the results of this exercise to relabel the tab and distinguish between formal and structured learning resources, and resources such as toolkits and webinars.
- **Alpha testing.** Three new MyGoodwill communities were alpha-tested for two weeks in April 2016. Five individuals from the original survey who had volunteered to support site rollout — and whose primary career areas involved the alpha communities — were invited to use and explore the site, accomplish a specific list of tasks, and provide feedback via a spreadsheet. An introductory webinar was held to provide basic training and instructions.

Several issues were resolved through the alpha testing process. The test results helped the team decide to increase the font size and change it from dark gray to black; create messaging and training specific to accommodating browser discrepancies when opening documents; and reduce the speed of the homepage carousel.
- **Beta testing.** The entire site was beta tested for three weeks in spring 2016. All employees whose primary career area involved the three alpha communities were invited to use the site and perform tasks. For those who preferred to offer less-structured feedback, the team created a feedback form. Overall, responses were positive, and indicated that the modifications made as a result of the alpha test resulted in fewer issues.

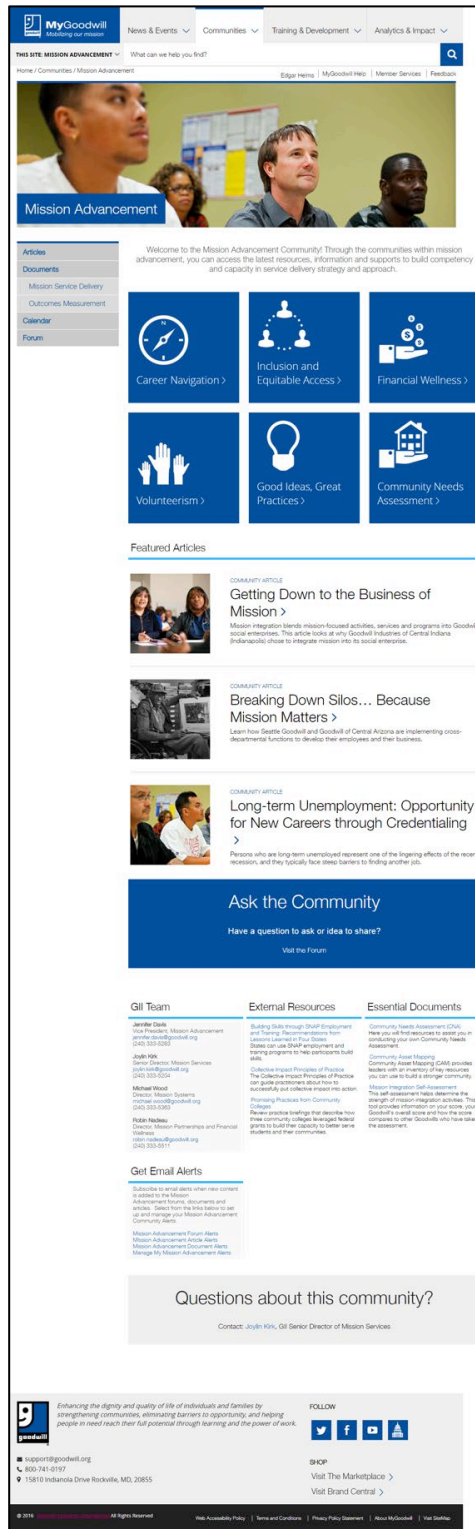
IA Redesign

Since its initial launch in 2011, the old MyGoodwill intranet had ballooned to a collection of 130 sites or communities. These were listed alphabetically in a permanent widget on the left side of the homepage, with no nesting or hierarchies to show relationships between similar sites. As another access point, the existing top-level navigation sorted 42 of the more prominent sites into two menus — *Communities* and *Member Services* — but the distinction between their purpose and execution was not clear to GII team members or users.



Pictured: Goodwill Intranet All Sites Widget. This shows the *All Sites* widget that appeared in the left column of the old site. Users had to scroll down to view all 130 available sites.

With the redesign, the team pared down the number of main communities to approximately 25, working with GII staff members to delete and consolidate content from existing sites. The remaining sites were grouped by discipline and organized hierarchically. For example, GII created a parent community for Goodwill's *Mission Advancement* work, with child sites underneath it for *Career Navigation*, *Financial Wellness*, *Inclusion & Equitable Access*, and other focus areas. Site owners reviewed and validated the new IA before the build.

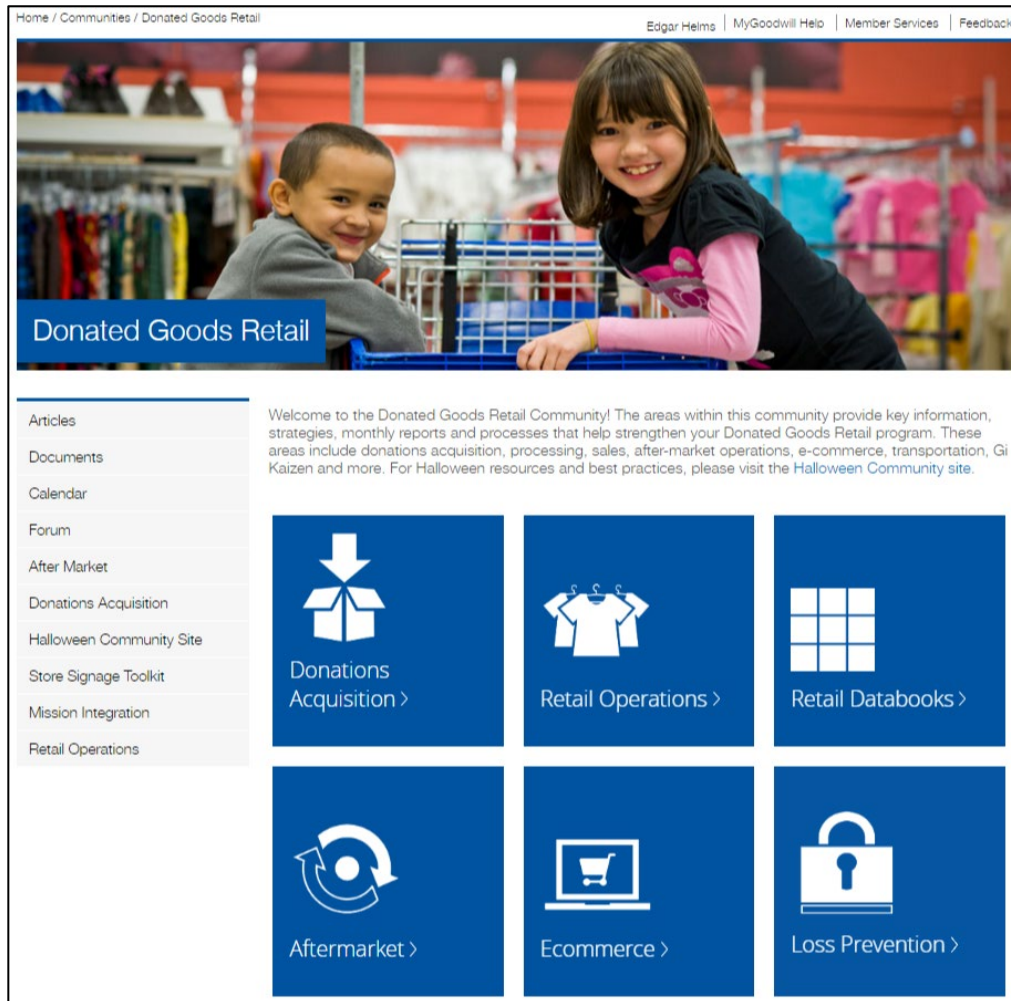


Pictured: Goodwill Intranet Mission Advancement Community.

Believing that searching for site content was faster than browsing it, the team sought to solve site structure and organization problems through a search-first homepage.

Designing Menus

When developing the new MyGoodwill intranet, GII originally deployed two types of menus: a top-level navigation menu, and quickstart menus on the left side of each site. For large parent sites, however, the quickstart menu quickly became overburdened with items. To solve this problem, GII developed a tertiary tile-based navigation system displayed in the site's main content area to help surface key information without taxing the quickstart menus.

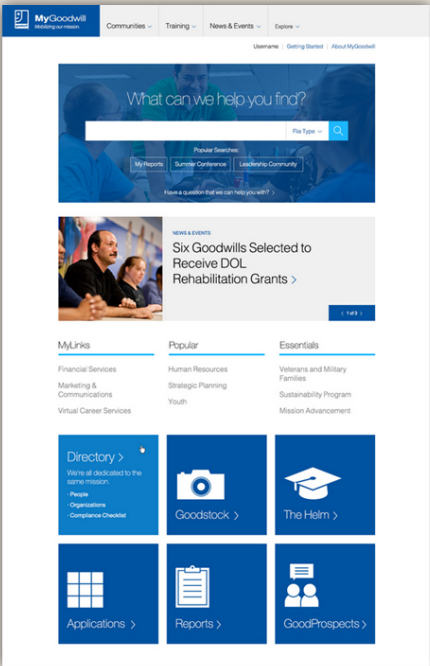


Pictured: Goodwill Intranet Retail Community Landing Page. This community landing page features the blue tile-based navigation that points users to deeper site sections that are not easily accessed through browsing. When a user hovers over one of the blue tiles, the icons slide up to display a short description of the destination link.

Adoption and Buy-In

One of the biggest challenges of an intranet project is getting buy-in from across the organization and enticing employees to use the new site. The GII team worked hard to make that happen. McCrehan describes some of the efforts that particularly paid off and contributed to buy-in and adoption for the new GII intranet:


- **Power users.** “Power users were enthusiastic about the technology shift and, in training and workshops with internal site managers, they often pointed out the features they were excited about and that were improvements over our previous site. In meetings with senior leadership, our team shared similar insights about the improved security, flexibility, and extensibility of the new site. Senior leader buy-in was critical, as they needed to secure their teams’ full participation in the tagging process in order for the search to be successful.”
- **Town hall meetings.** “We drummed up energy in town hall meetings by introducing new talking points for our Rockville-based team members to share as they were working with individuals at our member organizations. These talking points included the research we had done to respond our users’ input.”



The New MyGoodwill

- Clean, corporate “look and feel” developed by User Interface experts
- Images and icons bring focus to featured content
- Richer, more interactive search makes finding content easier
- Professionally developed taxonomy helps ensure that content is labelled consistently and easy to find
- New Goodwill Directory is easier to use
- Community pages are easier to manage
- SharePoint platform simplifies security and application integration
- Drop-down “megamenu” make for fewer clicks when navigating the site
- Rotating news feature conserves homepage space
- MyLinks allows personalization for most accessed links
- Ratings feature enables popular content to surface
- Graphic buttons and icons provide quick access to important resources

Launching in Spring 2016



This slide from a training presentation for the new Goodwill intranet features talking points used to drum up energy for the project rollout.

- **Wooing member organizations.** "We knew it was important to win over leaders at our member Goodwill organizations. Three months prior to launch, at a conference specifically for our executives, we had a session dedicated to introducing them to the new design, explaining our rationale and roadmap. We invited them to ask questions, and participate in ongoing feedback opportunities. Within two weeks of our launch, more than 25% of our CEOs had participated in a customized, hands-on live training webinar to introduce them to the site."

Following are examples of CEO user feedback that resulted from these sessions:

"It is much more intuitive and user friendly on first glance. I do appreciate your efforts."

"The site is a tremendous step forward. Thank you!"

- **Weekly live webinars.** "For the first three months following the launch, we scheduled weekly live introductory training webinars about the site. Additionally, we provided a series of 15 recorded mini-tutorials on important sections and features of the site. Total views of those mini-tutorials in the first 11 weeks were 1,230. A robust *Help* page includes links to FAQs and an online "who to call" reference. At Goodwill conferences in May and August, special sessions were held to introduce users to the site."

Following are examples of anecdotal user feedback from these sessions:

"I've been with Goodwill for over 11 years, and I've used MyGoodwill since I can remember. I love the new revision of the website! Best I've ever used."

"[I am a] first time user of the new site today and just wanted to say that I really like the new feel! Very open and much easier to find things so far! Thank you!"

Building Adoption over Time

It is important to remember that adoption and buy-in do not end at launch. Like a garden, intranet teams must continually tend the intranet so it grows and produces a great harvest for the company. With that in mind, GII is planning follow-on activities to those described above.

"Engaging our champion users will be key for us going forward," says McCrehan, adding that "Users quickly clued in to the value of the *Forum*, which GII will be leveraging to capture tacit knowledge. I think as soon as people know that they can get the answers to their questions using the *Forum* as soon as they might via email, we will be able to convert users to the *Forum* for those questions. I hope so. The *Forum* will provide a permanent warehouse for our collective knowledge."

WORKING WITH OUTSIDE AGENCIES

Agency	Project Role
Threespot	<ul style="list-style-type: none">• IA and graphic design
Protiviti	<ul style="list-style-type: none">• Infrastructure review• Directory design and development• Backend development
Wand, Inc.	<ul style="list-style-type: none">• Content analysis and design of fundamental business taxonomies

GOVERNANCE

The intranet is owned by the Governance team, which is comprised of digital/knowledge management and IT leaders. This placement has positively impacted processes and strengthened communication channels. Through this joint ownership, the digital team better understands the technology's complexities and resource requirements, and the IT team better comprehends the needs of users. The teams can be transparent and accountable to each other and to constituents by sharing in the Agile process.

INTRANET TEAM RESPONSIBILITIES

Role	Responsibilities
Core Governance Team	<ul style="list-style-type: none"> • Conduct overall site development strategy and planning • Evaluate new requests from stakeholders • Monitor data, including usage and performance, and consider areas for improvement • Oversee JIRA/Agile process • Oversee training for GII staff, Goodwill users, and directory administrators • Oversee communications and engagement strategy
Development Team	<ul style="list-style-type: none"> • Administer the SharePoint farm • Consult and execute on priorities for new sites and features • Configure unique permissions • Advise power users • Collaborate on integration of other Microsoft platforms
Power Users	<ul style="list-style-type: none"> • Advise community managers on site layout • Utilize web parts and other features, including views, to achieve community manager goals • Provide permissions at community level • Train community managers to maintain content and features
Community Managers	<ul style="list-style-type: none"> • Create content and upload documents • Promote and monitor forums • Monitor and report on usage on a monthly or quarterly basis • Remove outdated content • Respond to user requests and needs • Assign contributor rights

Contributors

- Create content and upload documents
- Promote and monitor forums
- Remove outdated content
- Respond to users requests

Training and Helpdesk

- Create recorded training modules
- Conduct live training sessions for users and directory administrators
- Resolve user issues, including password and new account requests

URL AND ACCESS**ACCESS INFORMATION**

Item	Status
URL	https://my.goodwill.org
Access/Remote Access	<ul style="list-style-type: none">• Users at the company's Rockville, Maryland, location are authenticated through a Windows login and Active Directory.• Registered MyGoodwill users at Goodwill member locations access the intranet through the programmatic form-based authentication (FBA) method.
Shared Workstations or Kiosks	Most users are based in the local headquarters of the 164 Goodwill member organizations and typically have dedicated offices and workstations. However, some employees who manage stores, contracts, and job services at other locations access via share workstations.

TIMELINE

PROJECT MILESTONES

Milestone Date	Milestone Description
April 2001	• First MyGoodwill intranet launch
October 2005	• Redesign launch with discussion forums (Liferay Open Source)
April 2010	• Launch with web 2.0 collaboration across the site (Alfresco Open Source)
February 2014	• Plan for enterprise shift to Microsoft technology • Begin infrastructure design and build
January 2016	• Implement page templates (look and feel)
April 2016	• Alpha launch: test three community sites
April-May 2016	• Beta launch: Test entire site
May 2016	• Launch of new design in SharePoint 2010

Overall redesign timeframe: 2 years

CONTENT AND CONTENT CONTRIBUTORS

Distributed Content Oversight

Many people across the GII organization touch various components of the content map:

- **Governance team.** The organization's 10-person governance team members are from the digital content and software development/IT functional areas. This team monitors the health of the site; reviews and prioritizes fixes, feature enhancements, and new site requests; and is responsible for planning.
- **Executive subcommittee.** A small executive subcommittee of digital and IT team leaders collects and reviews suggestions for significant updates to features and content.
- **Power users.** Power users advise community managers and assist them with page layouts and web parts. Members of the GII power user team also manage content that appears on the intranet homepage, on each primary navigation landing page, and on the site's *News & Events* section. Homepage content, such as popular searches, featured content, and essential links, is updated based on search and page-view data pulled from analytics.

- **Site owners.** Another group responsible for content comprises GII staff members who operate as site owners for their respective community sites. For example, the GII mission advancement team is responsible for contributing and updating content on the main MyGoodwill *Mission Advancement* site, as well as all of its subsites. Each site has one or two primary site owners who are responsible for maintaining the site's landing page and adding content. Each team can also appoint a number of site managers, a role that lets those users post content but not modify the homepage.

Content management within SharePoint sites is handled directly by site owners. For example, content within Goodwill's *Marketing and Communications* community is a shared responsibility held by appointed members of the marketing, public relations, and digital communications teams. These team members coordinate the posting and promotion of campaign toolkit materials, which often include assets from all three teams. Site owners are responsible for guaranteeing the accuracy and quality of the content they post.

Contributing and maintaining intranet content is considered part of the job function of site owners and managers. GII is known by its local Goodwill organizations as the Member Services Center (MSC), and many GII employees have a direct role in equipping local Goodwills with the information, services, and resources they need to advance their mission and business lines. The intranet is viewed as one tool through which this empowerment can take place, supplementing traditional email and phone-based interactions.

- **Other content managers.** Content for the site's news section is submitted by staff members at local Goodwill organizations and internal SMEs at GII. It is then vetted and posted by GII's communications specialist. Events content (such as webinars and trainings) are submitted by GII staff and added to the site calendar by GII's communications and public affairs program assistant.

Encouraging Contribution

The intranet team emphasizes that contributing content is not simply a checkbox that site owners and managers must tick, but rather is a professional development opportunity that staff can use to hone their writing skills and position themselves as SMEs for the larger Goodwill membership.

GII site owners and site managers are most receptive to contributing content in response to a time-based need, such as releasing a toolkit or report, advertising an upcoming webinar, or promoting a funding opportunity. When developing project or promotional plans, internal communications is increasingly a line item that staff members are accountable for. This includes contributing article content for GII's *News & Events* page and promoting the initiative within their own MyGoodwill site.

Encouraging intranet content contribution beyond these need-based updates often requires steady nudging. For example, if the team observes a site owner sharing an announcement, new resource, or other information to local Goodwill members via a listserv, power users might send a message encouraging that person to post the content on MyGoodwill as well. Further, if they notice sites with content that has not

been updated for a while, power users might contact the site owners to see if they have any recent developments or news that would be worth sharing.

Training

Over a three-month period during the intranet redesign, GII power users and Protiviti consultants held workshops and worked one-on-one with site owners and site managers across the organization to train users on how to configure their sites. This training included technical instructions and quick reference guides on how to use SharePoint to post content (including files, articles, and images), as well as strategic advice on how to keep content fresh and how often to update it. This one-on-one training was reinforced through broader organizational trainings on the topics.

Content management training continues to be a priority post-launch. The organization's monthly intranet brown bag series includes training and facilitated discussions on generating content ideas, leveraging team members' expertise as writers, developing editorial calendars, and promoting posted content (for example, via listserv). Also, training on writing for the web is offered annually to all staff members.

Maintaining Quality

The GII power user team is still engaged with GII staff members in post-launch training and development, and will continue to provide content guidance and support in the months ahead. More time is needed to identify emerging content issues and to determine how best to address them through feedback.

Content Guidelines

GII provides the following guidelines to GII site owners and staff members who are tasked with writing article content for their own sites or for the *Goodwill News & Events* page:

GUIDELINES ON WRITING FOR THE WEB

Length	<ul style="list-style-type: none"> • Ideal post length: 250–400 words • Average reading speed of most people: 200 words per minute • Keep paragraphs short: 1–3 sentences per paragraph
Audience	<ul style="list-style-type: none"> • Make information accessible by writing to your audience's reading/skills level • Avoid unfamiliar or technical terms • Aim for a 6th–8th grade reading level (as in most newspapers); check text grade level at http://www.storytoolz.com or using Microsoft Word's built-in feature
Link to External Resources	<ul style="list-style-type: none"> • Add hyperlinks to external resources/information whenever possible • Keep main text concise and give users links to more info
Keep Paragraphs Short	<ul style="list-style-type: none"> • Encourage reading by offering short paragraphs • Keep paragraphs to 1–3 sentences and hit "return" more often • Look for ways to shorten longer paragraphs, such as by rephrasing, breaking text into multiple paragraphs, using bullets, or adding hyperlinks
Use Bullets	<ul style="list-style-type: none"> • Use bullets when conveying a list of tips or sequential information • Aim for at least three bullets and no more than seven • Helps readers quickly locate the important information
Use Subheadings	<ul style="list-style-type: none"> • Use subhead to help users scan the article and make the text more visually approachable

Guidelines for News Articles

GII developed the following guidelines for staff members at local Goodwill organizations when submitting news for its *News & Events* section of the site.

When submitting articles for Goodwill News, please keep in mind the newsletter's priority topics:

- Best practices across all disciplines. When submitting a news item, consider elaborating on the process leading up to your event or achievement. Consider incorporating details about inception, planning, goals, challenges faced, results and advice you would give other Goodwills who may undertake similar efforts.
- Innovative ideas. If your agency has had successes trying something new in its operations, mission or communications initiatives, we want to hear about it.
- Awards, certifications and other recognitions earned by your agency, including those earned by individuals, teams and the entire agency.
- CEO news including news spotlights, recognitions, retirement announcements and new hires.

Guidelines for Selecting Photos

Finally, GII developed a slide-based guide for site managers on how to choose appropriate photos for use on MyGoodwill. The guide can be accessed at <http://bit.ly/MyGPhotoGuide>.

Culling Content

As part of the redesign, GII team members successfully reduced the amount of documents on the intranet. Prior to site migration, site owners took part in a cleanup period, reviewing the files and content within their respective sites and making decisions about what content to migrate. The team created an archive folder within each site on the old intranet; site owners used the folder for any files they wanted to save for historical and archival purposes, but that didn't need to be migrated over to the new site. During the migration, IT team members were instructed to bring over all files except for those inside a site's archive folder. The old content remains accessible to GII staff members through a specialized access URL.

What Worked and What Didn't

- **Effective team collaboration worked.** The cleanup process worked best when multiple members from the same team were engaged and made collective decisions about which content to keep, archive, and delete. Many individuals had not fully explored their site's content and were surprised to learn what was and was not available. Having team members work through the existing site content together fostered conversations about how well the content reflected the teams' strategic priorities and helped identify content gaps where additional information or files are needed.
- **Independent decisions were less effective.** The cleanup process was less effective when managed by a single individual appointed by his or her team to complete the task by a deadline. Without input from their teams, individuals had to make independent decisions about what to keep, archive, and delete from their sites. This process allowed teams to complete the task on time, but led to delays and surprises post-migration when the other team members found that the migrated files did not match their expectations regarding what content should be available on the site. For specific sites, the GII IT team deleted the newly migrated files, and encouraged the site's team to return to the original site and make collective decisions about what to keep, archive, and delete. Once the team reached a consensus, the files were migrated again into the new environment.

TECHNOLOGY

TECHNOLOGY	
Category	Technology Used
Web Server Hardware and Operating System	<ul style="list-style-type: none"> • Windows Server 2012 R2 • SQL Server 2012 (and later) • SharePoint 2010 Service Pack 2 • Microsoft Dynamics CRM 2013
Bug Tracking/Quality Assurance	<ul style="list-style-type: none"> • Atlassian JIRA
Design Tools	<ul style="list-style-type: none"> • Optimal Sort Chalkmark • Basecamp • InVision
Site Building Tools	<ul style="list-style-type: none"> • SharePoint 2010
Content Management Tools	<ul style="list-style-type: none"> • SharePoint 2010
Search	<ul style="list-style-type: none"> • SharePoint 2010 • WAND Taxonomies (Excel and Google Docs)
Directory	<ul style="list-style-type: none"> • Microsoft Dynamics CRM

Technology Evaluation

In early 2012, GII made the strategic decision to begin unifying its overall application infrastructure. At that time, the organization used an eclectic mix of .NET applications, Alfresco CMS, SugarCRM, PHP, ColdFusion, Java, and WordPress. Each of these frameworks requires very different skillsets, and being an organization of limited resources, the intranet team thought it best to move toward unifying around a common application platform and skillset.

They needed the chosen platform to

- Have a powerful CMS
- Have an established code base that is professionally maintained, readily available, and developed by reliable contractors
- Be extensible and flexible enough to act as a common platform for MyGoodwill as well as for new application development
- Be largely maintainable by nonprogrammers
- Leverage development skills already in-house

Secondary requirements include that it

- Have wide industry adoption

- Have a stable and maintained code base
- Have longevity in the market
- Offer easy-to-manage access and authentication security
- Be ready for integration with GII's standard office tools (including Outlook/Exchange, Word, and Excel)

Because the company's IT infrastructure is completely Microsoft (Windows Server, SQL Server, and IIS Web Server) IT operations felt that SharePoint would fit in easily and would be maintainable using its existing skills. This became another base requirement. With IT operations satisfied, team members measured SharePoint 2010 against other base and secondary requirements. It fit nicely, and they reasoned that bringing in a Microsoft flagship product was a low-risk decision.

While initial adoption of SharePoint was slow, the team began building new applications with SharePoint as the front-end. When the time came to start building out the new MyGoodwill, the team was able to get strong management buy-in and support, which greatly speeded adoption and built enthusiasm for the product.

Although they the site still has some legacy non-SharePoint applications, all new development is now being done in SharePoint, and the users and power users have become very comfortable using it. This, coupled with the enthusiasm generated by the new MyGoodwill, indicates that SharePoint was a fitting and proper strategic choice for the project.

ROI

Activity-Based Performance Indicators

Moving the intranet to a SharePoint platform provided an opportunity to track a number of new metrics not easily captured on the old Alfresco-based site. The organization now tracks several activity-based key performance indicators related to MyGoodwill use, including the following:

- **Page views.** Since the relaunch, the site has seen a 139% increase in page views, going from 6,454 to 15,470 average page views per week.
- **Search.** Search was a problematic feature on the old intranet, but its performance has also increased on the new site, growing 138% from 475 to 1,877 searches per week on average.
- **Unique users.** One new metric the team tracks courtesy of SharePoint capabilities is the number of unique users who log in to the site at least once a week (approximately 575). This number has steadily increased over the last quarter, even as the number of total user accounts has decreased due to data cleanup efforts.

Nuanced Tracking Measures

More nuanced tracking measures are also now in place with the new system. McCrehan explains how the team conducts a deeper dive into some of the more detailed aspects of site usage:

- **Total registered users.** "When we migrated to SharePoint from the old Alfresco site, we brought along roughly 11,000 accounts that had been created over its six-year lifespan. Once the new site was launched, we began to track the number of total registered users. Since May 2016, we have seen this number drop by about 1,500. We actually consider this decline to be a success, because it reflects the request of our members' local administrators to delete user accounts for people no longer with their organization. The decline confirms that this cleanup is taking place, and we expect an increase in users to begin as we move into 2017."
- **Top visitors.** "SharePoint allows us track the top visitors to the intranet in any given time period. This information gives us a sense of what users, departments, and member Goodwills are most frequently using the site. With this data, we know who we can engage as super users (individuals who frequently visit the site) as well as those groups that present the greatest opportunities for outreach and training on the new site."
- **Heavily trafficked days of the week.** "Other soft performance metrics we track include the most heavily trafficked days of the week (Tuesday, followed by Monday), and the most heavily trafficked hours of the day (2 p.m. EDT, followed by 3 p.m. EDT). This information is used to inform site owners of the most popular time to post MyGoodwill content and promote MyGoodwill content assets on the listservs. We also regularly collect qualitative feedback on MyGoodwill at Goodwill conferences and events following presentations or at a conference booth."
- **Helpdesk requests.** "The IT team tracks the number and nature of helpdesk requests submitted by local Goodwill staff members, which average 38 tickets per week. Analyzing these tickets shows us what areas are the most difficult or confusing, and lets us take steps to address these issues aggressively. For instance, there was a marked increase in requests for login assistance, which has caused us to bring a sharp focus on steps we can take to improve account request and password reset processes. The IT team also continually tracks standard system metrics like bandwidth use, CPU and memory utilization, responsiveness, etc. In our analysis so far, we see that we have slightly overbuilt the system, but that gives us a lot of room to grow as use of the website expands."

LESSONS LEARNED

The Goodwill team offers the following lessons learned from the redesign project:

- **Formalize the governance team and work with Agile.** “The formalization of a governance team and the adoption of the Agile process provided a transparent, open environment for understanding the parameters of our resources and technology and allowed us to advocate for users’ priorities. It was highly valuable that top-level leadership committed to the project as an iterative whole. This meant we could plan for ongoing improvements for short-, medium-, and long-term sprints. This created an environment in which we could prioritize work, knowing that we didn’t have to take any important and/or innovative ideas off the table. Our frequent mantra was, ‘Not no, just not now.’ The process also allows us to continue to conduct and be responsive to user experience work moving forward.”
- **Listen, listen, listen.** “Getting in the minds of our users was a fundamental shift in the way we thought about our new site. For 15 months before we launched, we engaged with our users in various UX surveys, focus groups, and one-on-one opportunities to understand their issues. For them, time and findability are at a premium when they use the site. They will remain engaged if they can find what they need.”
- **Focus on features that help get the job done.** “Our digital team might have enjoyed geeking out with potential new features and social options in the site redesign, but our team-wide collaborative needed to focus on providing a valuable service to users, and to get down to the business of surfacing content to help them do their jobs. Granted, this is not sexy, and the investment in search was complex and time consuming, requiring all-hands-on-deck participation by our Rockville-based employees, but this helped create a feeling of ownership, educate them about the technology, and drive them to rethink their sites’ purpose and content.”

American Medical Association (AMA) (2018)

OVERVIEW

COMPANY

The American Medical Association (AMA) is the premier national organization providing timely, essential resources to empower physicians, residents, and medical students to succeed at every phase of their medical lives. Physicians have entrusted the AMA to advance the art and science of medicine and the betterment of public health on behalf of patients for more than 170 years.

Headquarters: Chicago, Illinois

Company locations: The AMA has three locations: its headquarters in Chicago, and offices in New Jersey and Washington, DC.

Locations where people use the intranet: Employees in all three locations use the intranet.

Annual revenue: The AMA is a 501(c)(3) nonprofit organization.

TEAM

American Medical Association

Executive Leadership: Leslie Weber, Rod Sierra

Project Leadership: Justin DeJong, Toni Canada, Kristina Goel, Doug Fedorchak, Jordan Brandl

Intranet Product Team: Catherine Williams, Kristen Reynolds, Steve Rousopolous, Doug Mosurak, Josh Stahl

West Monroe Partners

Kaamil Dalal, Gordana Radmilovic, Alex Foucre-Stimes, Ryan Milton, Nolan Hopkinson, Adam Kerr, Tim Chow, Ted Nubel, Adam Nolte, Ted Novak (Clique Studios)

THE INTRANET

Users: Approximately 1,000 users; essentially all AMA employees use the intranet as a digital workplace that helps them work smarter and participate in cross-functional knowledge sharing.

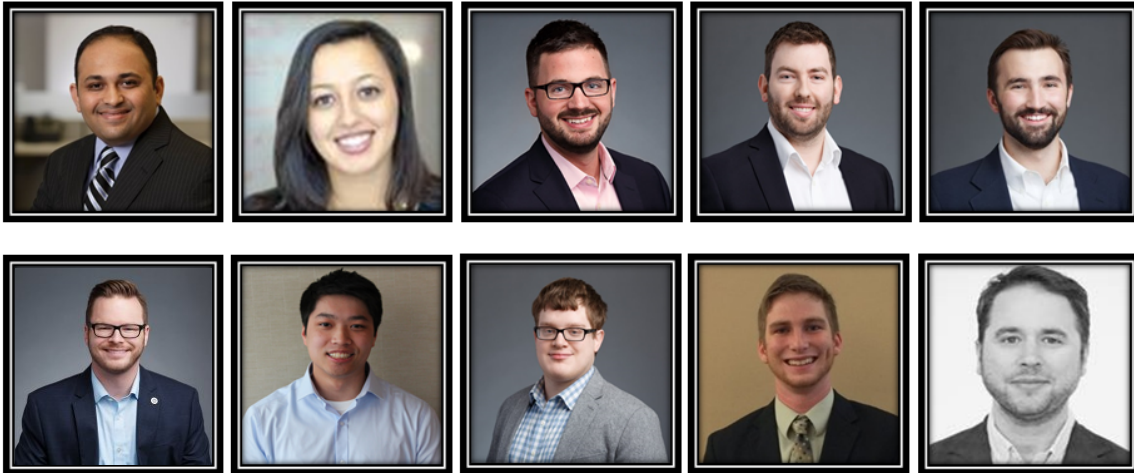
Mobile approach: Responsive web design

Technology platform: Office 365 and SharePoint Online

INTRANET TEAM



AMA Team members shown here (left to right): Catherine Williams, Doug Fedorchak, Toni Canada, Justin DeJong, Kristina Goel, Jordan Brandl, and Douglas Mosurak.



West Monroe Partners team members shown here (top row, left to right): Kaumil Dalal, Gordana Radmilovic, Alex Foucre-Stimes, Ryan Milton, and Nolan Hopkinson; (bottom row, left to right): Adam Kerr, Tim Chow, Ted Nubel, Adam Nolte, and Ted Novak (Clique Studios).

HIGHLIGHTS ABOUT THIS WINNER

With a site that had changed very little in 12 years, the AMA intranet team, together with West Monroe Partners, had both a daunting challenge and a great opportunity. They not only had to redesign an intranet that had grown to include more than 27,000 pages, but they also had to introduce new tools and collaboration processes to move the intranet forward and directly impact how AMA work is done. In addition, they used the redesign as an opportunity to improve internal communications and collaboration.

The AMA team decided to move the intranet onto Office 365 and SharePoint to support work and collaboration among the organization's 1,000 employees, who worked in 18 diverse business units in Chicago, New Jersey, and Washington, DC.

Project highlights included the following components:

- Reduce and rewrite content. The 27,000+ page intranet was filled with out-of-date content and pages that were unreachable via navigation or search. The team assessed the value of these pages to reassemble a site that met users' needs with only 120 pages of content. It also switched from centralized to decentralized publishing, creating a structure of content authors and managers throughout the organization. The new content roles are supported with regular meetings and communication.
- User research and involvement. The project started with a survey to assess use of and opinions about the intranet. The team used the feedback to set goals and help measure improvements and success. It also enlisted the help of a representative set of users throughout the development and design process, and even created four different personas that helped inform everything from visual layout and IA to security and permissions.
- Facilitate change management. Any intranet update is a change for employees. The AMA update not only included a new site filled with streamlined content, but also introduced new workflows, new collaborative tools, new technologies, and new publishing processes. Keeping users, content creators, and stakeholders informed of improvements and progress throughout was essential.
- Promote launch day. The team built excitement around the new site by using the "best" of the worst comments submitted on the survey about the previous intranet to create a "Mean Tweets" style campaign. The campaign used the negative things said about the site to advertise the new and improved site. On launch day, about one-quarter of all employees attended an open house, complete with giveaways, a photo booth, and a digital scavenger hunt. To encourage use, the team went beyond thinking solely about the intranet to revamp other internal communication channels — such as newsletters and digital signage — to push users to the intranet.

BACKGROUND

Goals

During a 2014 project aimed at developing an enterprise digital strategy, the AMA team recognized that the organization was not keeping up with technological advances that could help it engage with and deliver timely business information and resources to its nearly 1,000 employees. During this time, the organization was also in the midst of considerable transformation. Company leaders thus had to ensure that employees understood and were aligned with its ambitious strategic objectives aimed at serving its overall mission to improve the nation's health.

Improving internal communication and collaboration platforms was critical to shepherding this cultural change.

The organization's intranet had changed very little in the prior 12 years. With 18 diverse business units, including Advocacy, Enterprise Communications & Marketing, Finance, Health Solutions, Human Resources (HR), and Portfolio Management, it was a struggle to govern the intranet and its content effectively. As a result, the number of pages had bloated to more than 27,000.

In November 2016 a pre-redesign quantitative study was fielded to nearly 500 employees. The survey's objective was to measure employee satisfaction with the intranet before the redesign. The survey results helped the team determine why employees did and did not use the intranet, probe the reasons for any dissatisfaction, and explore how the intranet could help foster more collaboration.

The team reviewed survey feedback from employees across business units. The message was clear: employees felt disconnected, struggled to find subject matter experts internally, and found navigating the intranet's forms confusing. They also said that they relied heavily on managers or IT Support Center staff to answer questions.

To address these concerns and improve workplace collaboration, connectivity, and efficiency, the team initiated a project to revamp the intranet into a modern digital workspace for employees. It engaged West Monroe Partners in February 2016 to assist with the effort. Working with West Monroe, the team established four objectives for the intranet redesign project:

1. Increase employee engagement and satisfaction
2. Promote self-service
3. Serve as an information gateway
4. Connect employees

Challenges

The project faced two main organizational challenges that required major process changes; on the flipside, the challenges also represented tremendous opportunities to transform the organization. The challenges were as follows:

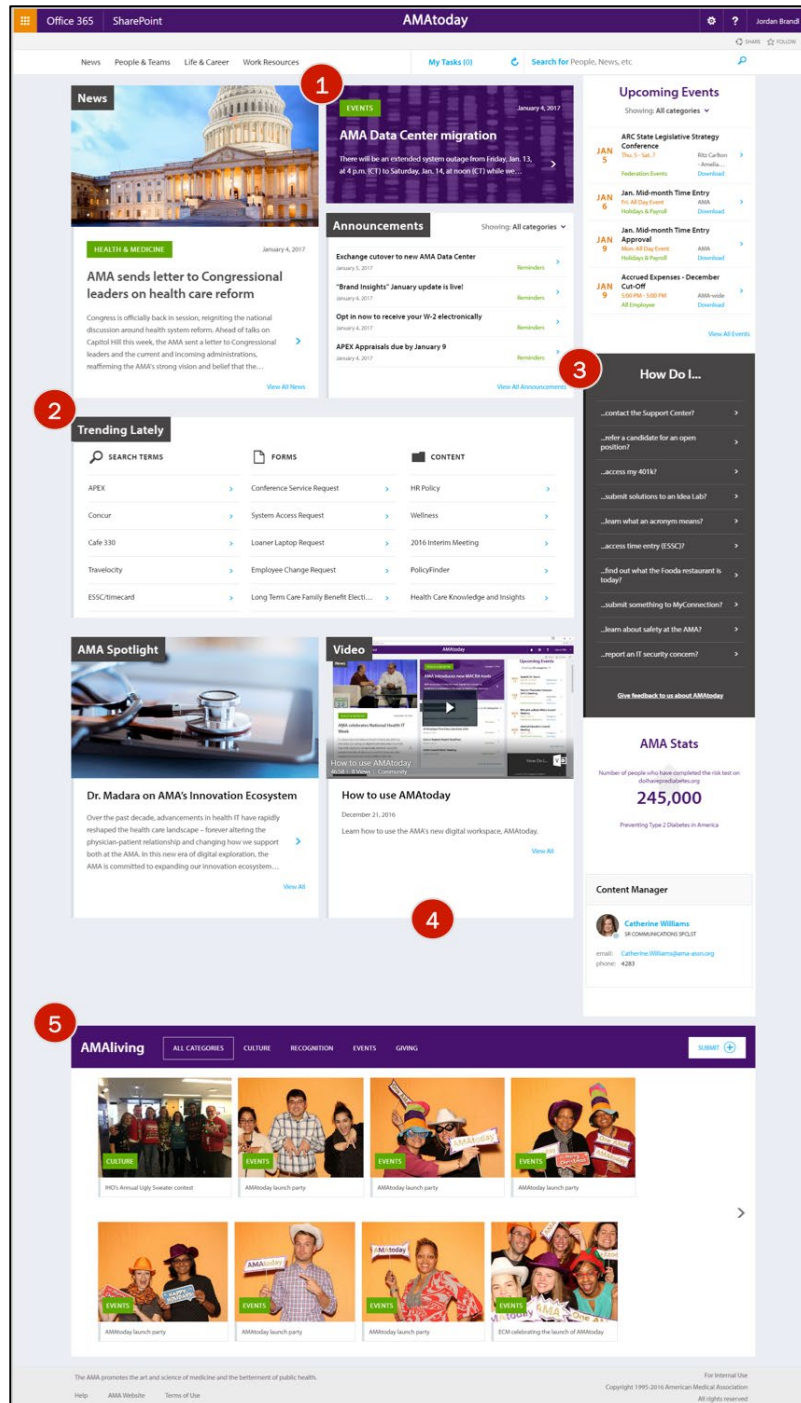
- Aversion to change. A key challenge in developing the new intranet was the organization's culture and traditional aversion to change. One implication? Many staff members had little familiarity or comfort with modern technologies, including digital workspaces and SharePoint Online tools. This also meant that the organization had inadequate technology, staff, and skills to support its business goals.
- Need for governance. To build a new, more robust intranet, the organization had to change the way it governed intranet content, including its publishing approach and how it might better ensure content that was relevant, timely, and accurate. Traditionally, the organization's business units relied on central IT resources to publish content and, because it was difficult to manage content dynamically, the intranet grew to more than 27,000 pages over 12 years. As part of the project, the team had to figure out how to reduce that to a manageable number of pages, and then manage those pages effectively on an ongoing basis. This required that the organization begin to see the intranet as a living, breathing product that requires a clear governance structure to support it in a thoughtful manner. The team also had to consider the time required to train content managers for the new intranet to ensure that knowledge transfer was as effective as possible.



Pictured: The Old AMA Intranet Homepage. This captures the look and feel of AMAweb, the AMA's previous intranet. The homepage allowed for only text-based announcements, with no categorizations to help users browse content. Multiple navigation bars with inconsistent formatting created confusion, and many of the links resulted in 404 (page not found) errors. Also, the employee events calendar navigated to another SharePoint site, and site users described search as "useless."

DESIGN REVIEW

Homepage

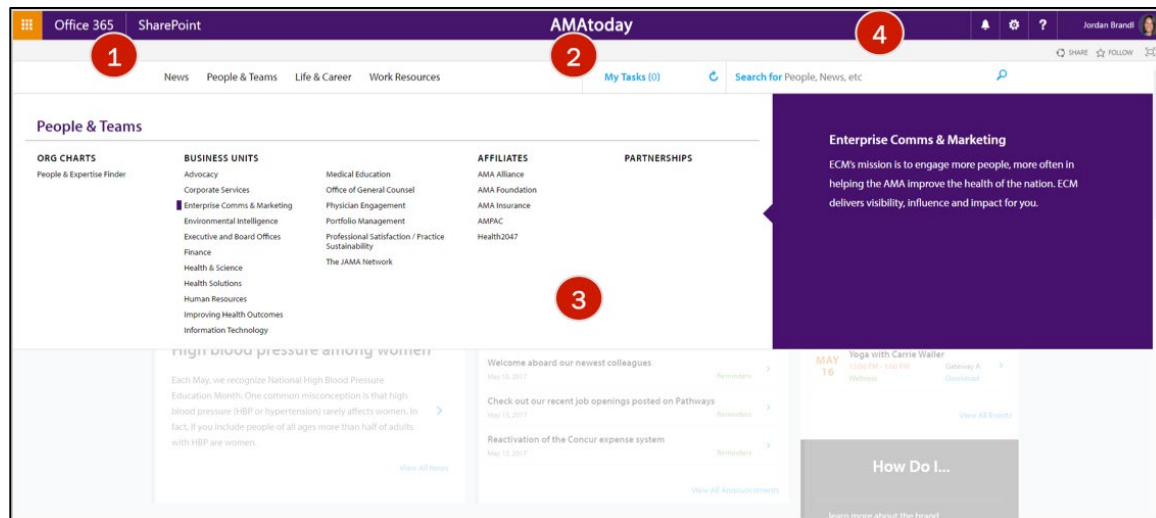


Pictured: The New AMA Intranet Homepage. The New AMAtoday homepage.

Homepage Highlights

1. **News, Events, and Announcements.** The homepage prioritizes new and timely information, with one section dedicated to the day's top news story, another highlighting an event, and an area for announcements. *News* items are dated and accompanied by a clear headline, the first few sentences of the story, a date, and a link to read more. There is also a link to *View All News*. The business-unit-generated *Events* and *Announcements* sections also feature clear dates, so users can easily identify updated information. An *Upcoming Events* calendar, which for the first time includes events from across AMA, appears in the upper right corner, with clearly listed dates and times, links to more information, and the ability to sort events by category. Tags are a new addition to site content, which gives users another way to sort and organize information.
2. ***Trending Lately.*** The homepage's *Trending Lately* section features a list of the site's recent popular search terms, forms, and content. This area acts as a shortcut to content that may be important for a limited time, such as insurance enrollment forms. A content manager curates the list based on analytics and general timeliness to ensure that the information is useful.
3. ***How Do I...*** The *How Do I...* section has links to common user activities, including accessing a 401(k), contacting the Support Center, or referring a candidate for an open position.
4. **Spotlight, Video, and Stats.** The bottom of the page is rounded out with a featured story on leadership and teams in the *AMA Spotlight* area, a featured video (in this case, an introduction to the intranet itself), informs users about interesting facts about the AMA. Corporate videos are a new addition to the site.
5. ***AMAliving.*** Creating opportunities for connection was a goal of the site, particularly since one of the main offices had recently moved to a new building with fewer common areas and fewer chances for casually connecting during the workday. In response, the team created a photo-sharing section of the homepage, called *AMAliving*. Users can submit photos, which are posted pending approval by the communications team. This site area has become very popular, and the large *Submit* button shows users how easy it is to send in a photo. The screen above shows photos from the new intranet's launch party.

Navigation



Pictured: AMA Intranet Megamenu. Hovering on one of the top-level menu items of *News*, *People & Teams*, *Life & Career*, or *Work Resources* expands the menu to show level 2 (bold across the top) and level 3 (listed beneath level 2) items. Hovering over level 2 or level 3 items exposes additional content in the purple box to the right.

Navigation Highlights

1. **User-focused and task-based categories.** On the previous intranet, users struggled to find information, which was arranged based on the company's organizational structure. The new site revamped the site organization to focus on user needs and tasks. Top-level categories of *News*, *People & Teams*, *Life & Career*, and *Work Resources* make it easy for users to know where to go to find the tools and information they need for their day-to-day work. Navigational categories were created after conducting card-sorting exercises with employees.
2. **My Tasks.** Users can access personalized content through the site's *My Tasks* section, which gives users quick information about upcoming deadlines so they can take action on assigned tasks.
3. **Megamenu.** Navigation is displayed in a megamenu, giving users immediate access to three levels of navigation. Subcategories are displayed in all capital letters and bold type to distinguish them visually from the third-level options below. When a user hovers over a link in the megamenu, additional information about that content is displayed on the right side of the megamenu. A colored rectangle indicates the category currently being viewed, and that rectangle's color matches the background color of the information displayed on the right. The team implemented this feature with a slight hover delay to prevent the menu from flashing new content at users when they were merely mousing over categories.
4. **Search.** Site and people search is available on every page of the site via a search box in the top right corner. Descriptive text shows users that they can search for various types of information, including people and news.

Business Units

Office 365 **SharePoint** **AMAtoday** Jordan Brandt

News People & Teams Life & Career Work Resources My Tasks (0) Search for People, News, etc.

Human Resources

What We Do For You

BENEFITS
We manage all the benefits offered to employees, from medical and dental to 401k, commuter benefits and everything in between. Let us help you get the most from your benefits.

EMPLOYMENT SERVICES
We partner with employees and managers to source and select talent, to develop and coach employees, and to counsel on workplace issues and organization design.

COMPENSATION
We oversee AMA's compensation strategy which includes base pay, incentive plans and incentive compensation. We partner with Employment Services on position evaluations and organization design.

LEARNING & DEVELOPMENT
We provide employee learning and development programs both online and in the classroom. We also consult with departments, teams and leaders to create more effective teams.

WELLNESS
We educate and motivate employees to achieve optimal health of mind, body and spirit. Participate in eligible events to earn a credit towards benefit premiums.

SECURITY
We protect you from physical threats that could cause serious losses or damage to you and the organization, including fire, natural disasters, burglary, theft, vandalism and terrorism.

Business Unit Announcements

APEX Appraisals due by January 9
January 4, 2017 [Reminders](#)

2017 AMA holiday observances
January 5, 2017 [Reminders](#)

Maintain, Not Gain Weigh-out
January 1, 2017 [Wellness](#)

Availability of pension benefit statements
December 19, 2016 [Benefits](#)

[View All Business Unit Announcements](#)

Business Unit Events

JAN 16 Martin Luther King, Jr. Day
Mon, All Day Event
[Download](#)

JAN 18 Netflix "Cooked" Part 2- Water
12:00 PM - 1:00 PM
Grand Canyon A/B
[Download](#)

JAN 24 On-site Health Coaching Open House
12:00 PM - 1:00 PM
Yosemite
[Download](#)

[View All Business Unit Events](#)

Key Contacts

[View Org Chart](#)

Advocacy, Per Pub
Toni Canada

Strategy, IT
Mary Hobbs

HR, Finance, JAMA, HSG
Gretchen Neeter

Physician Engagement, Foundation, ECM, and OGC
Deborah Hill

EVP/Board Operations, USC, Corporate Services
Kelly Sewert

Important Links

HR LINKS
ESSC [>](#)
Pathways [>](#)
APEX [>](#)
Motivation [>](#)
Fidelity [>](#)

[View All HR Links](#)

COMMUTER BENEFITS
Program Information [>](#)
Plan Highlights [>](#)
FAQs [>](#)
Enrollment [>](#)

[View All Commuter Benefits](#)

BENEFITS
Medical [>](#)
Leave of Absence [>](#)
401(k) [>](#)
Life Events [>](#)

[View All Benefits](#)

Leadership

Bob Davis
SVP- HR/CORP SVCS
email: Bob.Davis@ama-assn.org
phone: 4340
[View Org Chart](#)

How Do I...

- ...add a spouse or dependent to my insurance due to a life event?
- ...change my 401(k) contributions?
- ...request vacation carryover beyond 10 days?
- ...learn about professional development and training?
- ...change my name and address?
- ...get a replacement ID badge?
- ...initiate a leave of absence?
- ...earn a Wellness credit?
- ...look for a new position at the AMA?
- ...refer a candidate for an open job at the AMA?

Content Manager

Joe Lebeau
DIR- HR SYSTEMS/OPERS
email: Joe.L@ama-assn.org
phone: 4215
Content Last Updated: December 14, 2016

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Pictured: AMA Intranet Business Unit Template. This same template was used for all business units, and is the jumping-off point for this business unit's site.

Business Unit Highlights

1. *What We Do For You.* The page's first section is *What We Do For You*, which gives a concise summary of the unit's work to inform members of other business units. The section includes links to each of the business unit functions, leading to content pages within the site or to external links.
2. *Leadership.* This section includes the group leader's photo, name, email address, and phone extension, making it easy to get in touch. A link to the organizational chart also appears, so users can understand the leader's role and position in the organization.
3. *How Do I...* As on the homepage (and in the same location), the *How Do I...* section here provides business-unit-focused frequently asked questions. This offers two benefits: it gives users easy access to commonly needed information or processes, and it provides an additional, task-oriented introduction to the business unit's work.
4. *Events and Announcements.* Also similar to the homepage, these sections list business-unit specific events and news. Depending on how the content is tagged, it might appear both on the business unit's page and in the AMA homepage's *Events* and *Announcements* listings.
5. *Key Contacts.* This section lists up to eight important group contacts so employees know whom to contact with questions. Here and in the *Content Manager* section to its right, contacts are listed with click-to-chat capabilities, making communication simple
6. *Important Links.* The bottom of the page provides short lists of links important to the business unit audience, with links to see lists of all links.

Content Pages

The screenshot shows the 'Employee communications' page on the AMAtoday intranet. The page has a purple header with 'Office 365', 'SharePoint', and 'AMAtoday' logos. Below the header is a navigation bar with links like 'News', 'People & Teams', 'Life & Career', and 'Work Resources'. The main content area is titled 'Employee communications' and includes a mission statement, a section on 'Your connection to the news you need to know', and a list of frequently featured news items. A 'Content Author' box on the right identifies Catherine Williams as the author. At the bottom, there is a feedback section and a footer with copyright information.

1 Content Author

2

3

4

Pictured: AMA Intranet Content Page. The template for this third-level (general business unit) content page enforces a company-wide style that governs the available fonts, colors, and sizes. These elements are consistent across the site. The page's content manager is shown in the upper right, so users know whom to contact with questions about the page.

Content Page Highlights

- 1. *Content Author.*** The new intranet brought a shift from centralized to distributed content publishing. Content authors are selected based on their expertise, such as communications, marketing, or publishing, and their characteristics, such as being collaborative and willing to expand their current skill set. The team built content accountability into the template, adding the content author's information to each page of the site. The information includes the author's photo, name, title, email, and telephone number, as well as the date of the last content update. This tells users how timely the information is and whom to contact with any questions or corrections.
- 2. Consistent template.** A consistent template is used for content-level pages throughout the site. The template enforces the use of the company style governing fonts, colors, and sizes.
- 3. Inline links.** One of the many benefits of rewriting and organizing content in the redesign is that offers the ability to cross-link to other, related resources. The site does an excellent job of linking employees to appropriate resources within content pages, allowing them to find additional information easily if needed.
- 4. Feedback.** When appropriate, stories include a call for feedback at the end, inviting user comments or questions.

Forms

Forms Center

Forms | My Active Forms

Web | External | Downloadable | View All | Search all forms

FORM NAME	DESCRIPTION	ALL BUSINESS UNITS	PROCESS
Accrual Request	Submit this form to accrue for invoices that have missed the accounts payable processing window for the current accounting period.	Finance	Accrual Request
Conference Services Request	Use this form to book a conference room, and request A/V support, room layout preferences, and catering options.	Corporate Services	Meeting Request
Employee Change Request	Managers should submit this form to HR for processing of employees changes (job, pay, or transfers (supervisor, unit) that are not tied to a job requisition in Pathways.	Human Resources	Employee Job Changes
End of Employment	HR initiates this form for all terminating employees (regular, contract, intern). Form will be reviewed and approved by both the departing employee and supervisor.	Human Resources	Employment Termination
Equipment/Space Allocation	Submit this form if there is a new/existing employee that is moving into a workspace.	Corporate Services	Onboarding/Employee Change
Hardware and Software Request	Submit this form if you need to purchase computer technology for use in the AMA. Consumables such as thumb drives, toner cartridges and headsets should be ordered directly through STAPLES and not through this form.	Information Technology	Onboarding/Technology Needs
Loaner Laptop Request	Submit this form if you need to borrow a laptop in order to conduct AMA business while traveling	Information Technology	Travel
New Entity Request	Submit this form to request new entities, or manage existing entities (departments, projects, activities) and accounts.	Finance	New Entity Request
System Access Request	Submit this form if you need establish or delete an AMA login ID, to gain access to network folders, or an AMA email account. Use the Unix/Database access form for Database, Lawson or AIMS application access.	Information Technology	Onboarding
Tuition Assistance Application	Employees should submit this form to HR for approval of all requests for tuition assistance, prior to the start of the course. Form requires manager approval before submission.	Human Resources	Tuition Assistance

Content Manager

Corporate Services Form Owner

Finance Form Owner

HR Form Owner

IT Form Owner

Corporate Services Form Owner

Physician Engagement Form Owner

Content Last Updated: January 3, 2017

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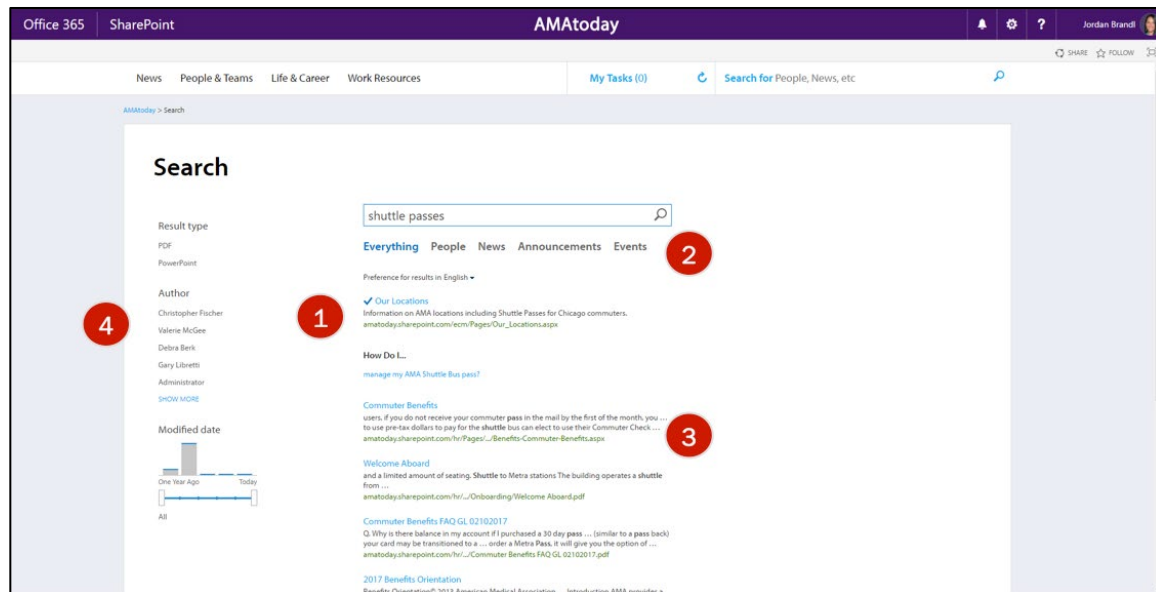
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Pictured: AMA Intranet Forms Center. Here the forms tab in the *Forms Center* is selected, with a key showing the iconography of form types: web, external, or downloadable. Forms are listed below this, with descriptions, business units, and processes. Users can filter by business unit or sort by any other column. Search is instantaneous (reacts while you type) and is available in the top right. Clicking a form will either download it (if it's downloadable), open in a new tab (if it's external), or open in the same tab (if it's a web form hosted on AMAtoday). The *View All/View Popular* toggle to the left of the forms search bar lets users view all available forms or a subset of popular forms curated by the center's managers, who are shown at the bottom of the page.

Forms Highlights

- 1.** Process change. A main goal of the site was to automate forms. The previous intranet had made it quite difficult to find and use forms. To prioritize which forms should be automated, the team looked at use cases to determine which offered the highest timesaving opportunities. A central library of forms saves time in locating the correct form, and automated workflows streamline processes.
- 2.** Searching and sorting. The *Forms Center* has its own dedicated search to help users find what they need. Users can also sort by form name or business unit.
- 3.** *My Active Forms*. Forms that users are currently using in some way are listed in *My Active Forms*, giving them a shortcut to important content. The *Active Forms* view lists all forms and their current status, such as *Pending Support Center Approval* or *Ready for Pick Up*.

Search



Pictured: AMA Intranet Search. This example search page includes people, returned at the top and bracketed together with pagination.

Search Highlights

1. Best bets. Best bets, or suggested results, are shown at the top of the results page and indicated with a blue checkmark. The team coded anything that appears in the megamenu as a best bet within the search results.
2. Scope. The default view is all results, indicated by the *Everything* category above the results. Users can also select to view only *People*, *News*, *Announcements*, or *Events* in their results.
3. Results. Search results list the page title followed by a snippet of text that includes the search query.
4. Filtering. Refiners based on time, document type, or creator are offered on the side of the page.

DESIGN PROCESS AND USABILITY WORK

WORKING WITH OUTSIDE AGENCIES	
Agency	Project Role
West Monroe Partners LLC A full-service business and technology consultancy that works with dynamic organizations to reimagine, build, and operate their businesses at peak performance. Its team of more than 800 professionals offers an uncommon blend of business consulting and deep technology expertise	<ul style="list-style-type: none">• Partnered with the AMA to design and build AMAtoday, a digital workplace leveraging best practices on the Office 365 platform• Provided methodology and human-centered design frameworks• Facilitated development of employee personas• Led user experience (UX) design of site prototype• Worked with Clique Studios to create visual designs that reflect the AMA brand

Design Approach

The AMA team's relationship with West Monroe Partners was beneficial. The project followed West Monroe's DEEPEN methodology (define, empathize, envision, plan, and enact) to ensure it created an employee-first intranet. DEEPEN let the design team combine employee input with human-centered design and rapid prototyping frameworks to bring digital workplace design to life. Research activities included:

- Surveys and interviews. The team conducted an association-wide survey to gain a baseline understanding of employee perceptions about their workplace, including the usefulness of existing intranet and other digital tools. The survey provided a mix of qualitative and quantitative data, which was analyzed and presented to the product team. This data validated the team's own observations about needed improvements, and also highlighted previously unidentified challenges employees faced when trying to work digitally. Following this initial survey, team members interviewed a cross section of more than 40 employees from all business units, AMA tenure levels, degrees of digital aptitude, and leadership responsibilities. This group continued to provide feedback during the project's design and development phases.

- **User research.** The intranet team engaged employees at all levels of the organization to understand their needs, habits, behaviors, and motivations. The team used human-centered design frameworks and rapid prototyping to incorporate employee feedback throughout the design process. For example, before beginning design, team members conducted an association-wide survey to understand employees' perceptions of their workplace and the usefulness of existing intranet and digital tools. They also conducted detailed interviews with employees representing a cross section of business units, organizational tenure, digital aptitude, and leadership. These interviews provided greater insight into how employees work and how the AMA can help them become more productive, collaborative, and engaged. The AMA's Employee Communications team continued to involve this panel by asking its members to review and provide feedback on the intranet prototype. The project team also used a survey and ranking exercises to prioritize digital features and functions based on their importance to employees.
- **Personas.** Four personas were identified during employee workshops led by West Monroe in April 2016. More than 40 employees from across AMA business units participated in the workshops. The workshop objectives were to understand how different AMA user groups interact with the intranet, and then define the user archetypes to assist with the redesign.

The four personas identified were *New Hire* (the neophyte), *Connected Employee* (the net-worker), *Efficient Employee* (the organizer), and *Content Author* (the publisher). For each persona, West Monroe identified specific work styles (behaviors), top-used features on the current site, who they often collaborated with, and how they interacted with the current intranet.

During multiple small-group workshops with employees, team members asked prepared questions to create dialog around behaviors, including communication methods, technology usage, old intranet (AMAweb) interactions, forms usage, and motivations and frustrations with using the intranet, along with other topics. To draw honest responses, they made sure not to include executives alongside their subordinates. They organized the findings and combined them with objective data, such as tenure and job title, to develop life-like representations of a cross section of AMA's workforce.

These personas helped team members match features to profiles, helping them make decisions about visual layout, IA, and security and permissions.

- **Content analysis.** The combined project team also analyzed the top content needs, gathered through employee feedback, and decided to relaunch the site with 120 pages of content, down from 27,000 on the previous intranet.
- **Use cases.** The team also analyzed use cases to prioritize which forms to automate (such as those offering the greatest timesaving opportunities).

- Card sorting. The team's focus was to create an employee-focused site navigation based on task execution. To accomplish this goal, team members developed an inventory of existing and new intranet pages and links and put them on index cards for a card-sorting workshop. In collaboration with users, they organized the cards in logical groups and developed level 1 and level 2 labels. For example, the level 2 items *Careers*, *Learning and Development*, and *Performance Management* were rolled up under the level 1 *Employee Development* item, which was under the *Life and Career* navigation heading.
- Prototypes. At the core of West Monroe Partners' design approach to creating best-in-class designs are its interactive prototypes. These prototypes are published online and accessible to team members 24/7. An interactive prototype is more compelling than a typical static wireframe because it functions very much like a real site. It is also a very effective tool for confirming requirements with system users and communicating those requirements to the technical team. The project came to life when the team reached the prototype phase and tested these designs with real users. The UX and technology specialists began designing the site structure, navigation, and page layouts, then filled them in with features based on personas and priority. Tremendous thought and discussion went into positioning items on the page and determining the content flows. Using Axure (a digital prototyping tool), they created connections between the various buttons, links, and pages to provide the flow of a nonlinear experience. The AMA's marketing team provided sample content and imagery. This approach allowed the designers to present features using the personas as the lens through which to tell a story about how functions would work. They were then able to rapidly update (or iterate) the prototype to reflect feedback; this helped them remain focused on creating a system that employees desired and leadership valued, and was also feasible from a technology standpoint.

Office 365 **Delve** **AMAtoday**

Search

Home
Me
Favorites

People

- Jordan Brandl
- Catherine Williams
- Barkley Payne
- Steve Brown
- Ted Grudzinski
- Daniel Fox
- Kristin Reynolds

People

- Jordan Brandl
- Catherine Williams
- Barkley Payne
- Steve Brown
- Ted Grudzinski
- Daniel Fox
- Kristin Reynolds

Jordan Brandl
SR PROJECT MANAGER (IT)
40210

Jordan.Brandl@ama-assn.org
jbrandl@ama-assn.org
4820
773-936-3804
OneDrive files shared with me

Today

2p 3p 4p 5p 6p 7p 8p 9p 10p 11p

About me

I have 15 years of experience in the healthcare industry, 10 of those serving as a business analyst and project manager here at the American Medical Association. I have had the opp...

[View more about me](#)

- AMAtoday, PolicyFinder, AMAstore, Intelligence Hub, Board Portal, MACRA 2.0
[View projects](#)
- Project Management, Business Analysis, Requirements Analysis, Process Improvement, SharePoint, vendor management, Development Life Cycle (SDLC), Agile, Issue Management, Risk Mitigation, Customer Persona Development
[View skills](#)
- Columbia College Chicago
[View schools and education](#)

[View Profile >](#)

Organization

- James Madara**
EXECUTIVE VICE PRESIDENT - CEO
- Bernard Hengesbaugh**
CHIEF OPERATING OFFICER
- Leslie Weber**
SVP & CHIEF INFORMATION OFCR
- Doug Fedorchak**
DIR- SOFTWARE STRAT/DLVRY
- Jordan Brandl**
SR PROJECT MANAGER (IT)
[Direct Reports \(1\)](#)
- Melvin Petties**
Consultant - Protiviti

Wait, where are the documents?

Seems like Jordan Brandl hasn't shared any documents with you.

As soon as Jordan Brandl starts sharing files with you in OneDrive for Business, in Sites, or as email attachments, you'll see them here.

[Send an email to Jordan Brandl](#)

Click a person to see what they're working on [See all >](#)

- Doug Fedorchak**
DIR- SOFTWARE STRA...
- Melvin Petties**
Consultant - Protiviti
- Jim Krzyzewski**
DIR- APPLICATION DEV
- Shiraz Najam**
SR PROJECT MANAGE...

Get Delve apps
Are my documents safe in Delve?

Pictured: AMA Intranet Employee Profile. The employee profile page (standard SharePoint functionality) includes a search sidebar to find other employees. *Contact Info* and *About Me* give employees basic information on the person's job functions and contact information. Project lists show the person's involvement in initiatives, while the skills and expertise areas provide searchable tags that let users find similar expertise across the organization.

Information Architecture

As mentioned above, the team used card sorting to determine content placement based on specific user needs. The market research team then initiated online tree test studies with employees. The objective was to determine whether or not users could find content using the new IA. The online study asked AMA employees to use a hierarchy (“tree”) of topics and subtopics when locating specific content or completing certain tasks (depending on the respondent’s persona).

The respondents included representatives from each of the target personas: new hires, connected employees, efficient employees, and content authors. The tree test’s results demonstrated that all personas generally had the least trouble finding content related to news, organizational charts, and business units. Some, especially the new hires, encountered difficulties with the placement of *Top Links* content and with the language used to describe some content in the main navigation menus. The results were used to modify content placement and the content descriptions.

The new IA was also included in the prototype so users could see how the new megamenu would look and work.

The team learned a valuable lesson from their IA design efforts: don’t underestimate the effort and analysis required to create an intuitive IA and navigation. For example, a new hire looking for payroll functions might be inclined to look in the intranet’s HR section, but what if that function is technically within the Finance department’s purview? As this small example illustrates, it is important to design IA based on how employees think, not necessarily how an organization is structured.

Getting Buy-In

Several efforts were aimed at gaining buy-in from across the organization. First, the team conducted a pre-initiative employee engagement and satisfaction survey to solicit feedback and establish a baseline for the future platform. Next, it engaged employees from all business units to participate in discovery sessions. This helped the team capture the voice and convince employees that the intranet design team was in fact listening and responding to employees’ needs as they designed the new site.

The team also created a steering committee comprised of key leaders from the Communications, IT, HR, and Finance units. This ensured representation from the operational units with a stake in facilitating the site goals, enabling the new platform’s creation, and owning and supporting AMAtoday in the future.

Another key to successful adoption was an integrated communication plan that was introduced well ahead of the launch. This plan included a video and internal ad campaign featuring “Mean Tweets” — that is, verbatim comments about the old intranet taken directly from a preliminary employee survey. In these video segments, AMA leadership read the unfavorable employee feedback about the old intranet, cleverly delivering a clear message: “We have heard you, and the new AMAtoday is coming.”

Print ads outlined the site’s new features and functionality. On launch day, December 1, 2016, the intranet team hosted an all-employee open house, with snacks and a fully staffed information booth to help employees log on for the first time. The launch events also featured interactive contests to help employees discover the new platform’s features and content. The goal was to get users comfortable by breaking

the ice on the new site. Those who stepped up to the challenge (more than 300) won AMAtoday swag. These early efforts were key to generating early user adoption and increasing the average daily use to better than 50%.

GOVERNANCE

INTRANET TEAM RESPONSIBILITIES	
Role	Responsibilities
AMAtoday Steering Committee (senior management in Communications, IT, HR, Finance)	<ul style="list-style-type: none"> • Champion the platform • Prioritize future features and functionality
AMAtoday Product Owner and Manager	<ul style="list-style-type: none"> • Reinforce site governance • Create editorial content • Curate the 18 business unit pages and all homepage content • Prioritize future releases • Serve as chief editor • Assist in training content managers and authors • Integrate Employee Communications channels to push users to the site
AMAtoday Content Managers (18)	<ul style="list-style-type: none"> • Represent business units' roles and priorities in pursuing the AMA mission
AMAtoday IT Support Staff	<ul style="list-style-type: none"> • Provide guidance for platform technology capabilities • Develop new features for maintenance releases • Provide support and training for employee inquiries related to site functions and features

URL AND ACCESS

ACCESS INFORMATION	
Item	Status
URL	https://amatoday.sharepoint.com
Default Status	AMAtoday was set as the default homepage in IE for 30 days after launch; users were then allowed to change their default homepage.
Remote Access	<ul style="list-style-type: none">• The application is cloud-hosted using the Microsoft Office 365 platform.• Users can log in using their corporate credentials from any location with internet access.• Office 365 credentials are federated with the on-site identity provider using Azure Active Directory and IBM Tivoli.

TIMELINE

PROJECT MILESTONES	
Milestone Date	Milestone Description
2005	<ul style="list-style-type: none">• Launch of old AMA intranet
February 2016–May 2016	Research, design, and development activities for new intranet, including: <ul style="list-style-type: none">• Content assessment• Requirements gathering• Product backlog• Development of employee personas• UX design• Visual design• Functional and technical design• Content and technical governance planning• Office 365 tenant setup and configuration
June 2016–November 2016	<ul style="list-style-type: none">• Build and iterative user acceptance testing sprints• Content mapping and content creation• End-to-end performance testing and page tuning• Final user acceptance testing• Change management• Launch preparation
December 2016	<ul style="list-style-type: none">• Launch of AMAtoday

CONTENT AND CONTENT CONTRIBUTORS

Content Management Team

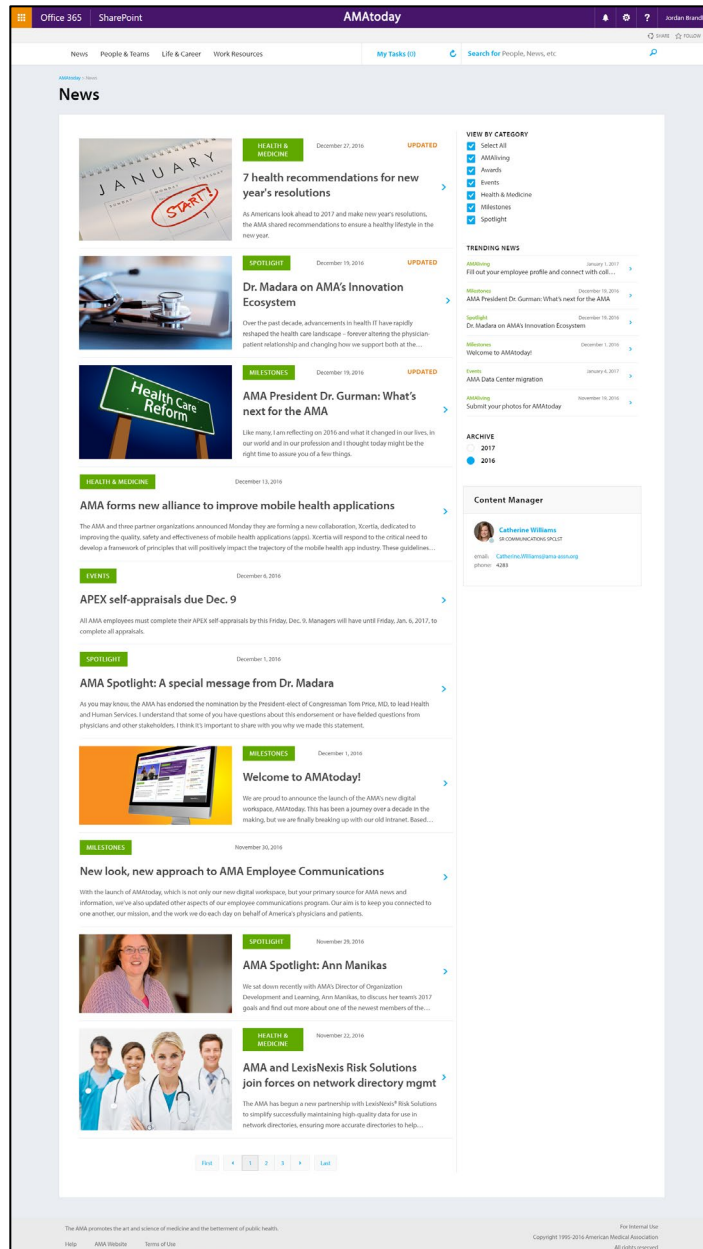
The AMAtoday content management team consists of 18 content managers representing each of the groups listed under the main navigation's *People & Teams* section. Content managers serve as the first point of contact for their respective business unit and as a liaison to Employee Communications. They also oversee their respective business unit pages and content, apply processes to ensure consistency across the platform, and leverage opportunities to share the business unit's story and messages.

Specific responsibilities include:

- Identify topics of interest to all employees and collaborate with Employee Communications to incorporate the topics into the AMA editorial strategy (e.g., leadership perspectives, spotlights, new stories, communications briefings, signage)
- Serve as an ambassador to AMAtoday and help business unit staff members utilize the platform
- Update business unit news on a regular basis and identify opportunities to promote content up to the AMAtoday homepage
- Train content authors and business unit contributors to use AMAtoday's self-service functions
- Ensure all business unit content, including announcements, events, descriptions, and sublevel, are 100% compliant with the AMAtoday style guide
- Work with content authors to correct any errors and to ensure content adheres with the AMA brand voice and style guide
- Seek collaboration on *MyConnection* and other Employee Communications amplification opportunities as measured by quantity and quality of announcements and relevance to all AMA employees
- Attend content manager monthly meetings
- Meet digital calendar and *MyConnection* submission deadlines

In addition to the business unit content managers, the site's hybrid governance structure includes content authors who oversee content for a specific team, project, or program.

Senior leaders of each business unit chose the authors based on their expertise (in communications, marketing, publishing, etc.) and on key characteristics, including being collaborative, diplomatic, and self-starters; willing to expand their current skillsets; and having strong writing and editing skills (including familiarity with *AMA Style Guide* and *Associated Press Stylebook*) and intermediate knowledge of the Microsoft Office Suite.



Pictured: AMA Intranet News View All Page. News articles include published date, green category tags, and orange *Updated* and *New* tags to help users identify what this article is and when it was published/updated. Category tag filters let users filter by the green tags. *Trending News* uses SharePoint's popularity metric to pull articles with more recent page views, and the archive filter lets users look at articles by year. Pagination is included at the bottom so users can page through to older articles. The *AMA News* editor is listed in the *Content Manager* widget with click-to-contact capabilities.

Culling Content

When the project began, the existing intranet had more than 27,000 pages, many of them created at least five — and as many as 12 — years before. That total also included many orphaned pages that weren't discoverable via search and were not linked to other pages.

The team assessed content based on the following criteria: age, analytics, relevance, and strategic priority. That information, combined with employee traffic (where available), provided a good starting point for reducing content.

Team members also took other steps, including bundling various policies and procedures into single documents. They continue to refine this approach, but it has already helped to reduce and centralize hundreds of previous pages that applied to single organizational procedures.

After reviewing content and removing any extremely outdated pages, the team created a grid of the most-visited pages based on Google Analytics and pages that were rarely visited but potentially important to various business units or key topics (such as committees and clubs, and employee discounts). Next, team members engaged each business unit in the process, meeting with content managers and key experts from all 18 units. Using the newly created business unit page template, they assessed each unit's current content to decide what to directly migrate, revise, add, or remove. Then, they provided the business units with a framework for their new pages and the content/design requirements (such as word count and design limitations for each module).

Another important part of this process was assigning ownership for previously un-owned pages, such as locations, AMA partnerships, and onboarding. Connecting and empowering internal experts to maintain/invest in these pages was part of enforcing the hybrid governance structure. All of the content removed from the site was placed in a content library. Content managers worked with the Employee Communications team and key business unit contributors to revise their information. All content received final review and approval from business unit leadership. It's important to note that this process of content review/revision/enhancement is never finished. The team continues to revise and add pages to the site, while adhering to the new site guidelines created as part of this project.

CONTENT DEVELOPMENT AND OVERSIGHT	
Encouraging Contribution	<ul style="list-style-type: none"> The team hosts monthly AMAtoday Content Management team meetings, during which it shares technology updates, brainstorms new editorial ideas, and reinforces governance and channel deadlines. These efforts encourage contribution. In addition, the content manager job description (see above) outlines standard expectations for the position and for maintaining current, relevant content on the intranet.
Training	<ul style="list-style-type: none"> The AMA Employee Communications team hosts monthly training for content managers and authors. Additionally, the intranet team created a <i>Content Guidelines and Procedures Playbook</i>, as well as a flowchart (see below) to help the content team communicate about the new publishing process and how employees can engage with Employee Communications channels.
Maintaining Quality	<ul style="list-style-type: none"> The team uses Employee Communications channels (digital signage, e-newsletters, and the intranet) to solicit feedback from employees to a proxy mailbox. It also conducts an organization-wide survey to gather feedback and generate ideas for improvement. Contact information for the platform's owner is available on the AMAtoday homepage. The design team has also designed accountability into the page templates. Almost all pages include the content manager's name and contact information (including a link to employee profile, title, email, and phone number) and "content last updated: [date]." This lets employees know how fresh a page is. These UI elements have motivated content managers to own their areas of the intranet and keep them updated. This functionality and accountability was not available in the old platform and was one factor that led to page bloat.

AMAtoday Content Guidelines and Procedures

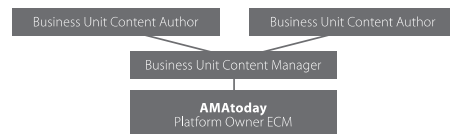
Content Author(s) (Business Unit)

- Owns and manages content on their respective Business Unit subpage
- Works with their Content Manager to identify and feature Business Unit content that is applicable to all AMA employees
- Requests Business Unit content to be featured on the home page when applicable

Platform Owner (ECM)

- Develops content for the AMAtoday home page
- Manages the site to discover and address inconsistencies (per Content Playbook guidelines)
- Seeks and implements integration among AMA's digital channels
- Reviews submissions from content authors and content managers to curate content for the home page or OneAMA calendar

AMAtoday: Hybrid governance model



The Business Unit pages will be reviewed and mapped in partnership between ECM and the Business Units. Maintenance of these pages will be managed by Business Units within the governance guide and with editorial guidance from ECM.

In a hybrid model of intranet content governance, the Platform Owner oversees policies, procedures, and compliance while Content Managers govern their individual department's Content Authors.

Technical support for AMAtoday will be provided by our Information Technology department. All issues and requests should be sent to support@ama-assn.org. Editorial issues or requests should be sent to the Employee Communications team at employee.communications@ama-assn.org.

Forms Center requests should be sent to our IT support team at collaborationsupport@ama-assn.org.

Tagging and metadata guidelines

Tagging and metadata creates a content map within the intranet site that will make the search function robust and connected and therefore increases our colleagues' efficiency and helps us connect the dots.

Content authors will be asked to include tagging and metadata in all content, which will be important for items like cross-site announcements/calendars and search. The tagging and metadata is set at a global level so authors will be asked to adhere to the following enterprise-wide tagging structure:

Events

- All employee
- AMA Exhibits and meetings
- BOT and leadership
- Charity/Jeans Day
- Federation events
- Holidays and payroll
- Training
- Wellness

Announcements

- Benefits
- Reminders
- Special events
- Training and performance
- Wellness

The creation of new tags or edits to alter an existing tag will be approved by the AMAtoday Steering Committee to ensure proper governance.

The following core metadata is captured via auto-tagging in our content management system:

- Created By
- Created Date
- Modified By
- Modified Date
- Division/Department/Functional Area

Additionally, a version history is tracked for documents with the ability to revert to a previous version.

Pictured: This page is an example from the *Content Playbook* tool, which the team designed to guide content owners and outline best practices for future intranet content planning, creation, and oversight across the new intranet.

TECHNOLOGY

TECHNOLOGY	
Category	Technology Used
Web Server Hardware and Operating System	<ul style="list-style-type: none"> Office 365/Azure/cloud
Bug Tracking/Quality Assurance	<ul style="list-style-type: none"> JIRA
Design Tools	<ul style="list-style-type: none"> Axure/Sketch/Invision
Site Building Tools	<ul style="list-style-type: none"> Custom deployment tool built using SharePoint Patterns & Practices toolkit (https://github.com/SharePoint/PnP)
Content Management Tools	<ul style="list-style-type: none"> SharePoint Online
Search	<ul style="list-style-type: none"> SharePoint Online
Other Functions	<ul style="list-style-type: none"> In-app instant messaging integration with Skype
Workflows & Forms	<ul style="list-style-type: none"> Nintex Workflows Online Nintex Forms Online

The tech team knew it wanted to use the SharePoint platform for the new intranet, but it had to decide whether to implement the new intranet on SharePoint 2016 on-premise or move to the cloud and use either SharePoint Online with the standalone plan or go with the full suite of Office 365 and SharePoint Online. The process of determining which of these paths to choose began in the discovery phase; a critical tool the team used to help make the decision was a matrix that compared each option's pros and cons against four key factors:

- Investment: What is the cost for licensing, infrastructure, etc.?
- Set-up time: How quickly can the environment be ready?
- Scalability: Will the platform easily scale to support further extensibility for later intranet phases?
- Cloud roadmap: Is there a future vision to migrate on-premise services and infrastructure, such as email (Exchange Server) to the cloud?

Working with the internal AMA team, the WMP technical team ultimately decided that the best approach was to move forward with E3 licenses in Office 365, but roll out only SharePoint Online and Delve.

This decision was heavily weighted on the AMA's cloud roadmap. Existing SharePoint sites that many employees used daily were hosted on aging SharePoint 2010 and SharePoint 2013 servers. The intranet redesign was seen as an opportunity to show innovation and kickstart the AMA's cloud strategy.

Customizing Office 365

The intranet is highly customized but also uses core aspects of the Office 365 platform. At the project's outset, the team knew it wanted to implement a design that retained the AMA's highly visual brand, but still keep it within the bounds of the SharePoint Online platform. The team also knew that it wanted to leverage the new intranet to modernize the forms process for employees by moving away from paper forms with hard signatures to digital forms with automated workflow processes and digital signatures.

For the visual design, the customization was done using client-side code (HTML, CSS, JavaScript) and standard SharePoint components such as lists, customized page layouts, pages, content editor web parts, and various APIs for retrieving page content programmatically. The forms and workflow customization was done using the Nintex Forms and Nintex Workflows third-party tools, with customized CSS to carry over the branding from the intranet onto the Nintex forms for a consistent look and feel.

In addition to branding and forms, the team also customized the platform's integration with Skype for Business on-premise. Whenever a person's name or picture appears on the intranet, it includes a button to directly IM that person on Skype for Business. Because the AMA was rolling out Skype for Business and the new intranet simultaneously, it wanted to ensure the two systems were integrated.

Print to PDF

AMA

Form status: Pending Support Center Pick Up Confirmation

Loaner Laptop Request

Directions for Reserving a Loaner Laptop

- Complete the User Information below for the intended user of the laptop
- Complete the Requestor Information below with your information; this is signifying that you will be taking responsibility for the pickup and drop-off of the laptop.
- Please submit this form at least 2 business days before the date that the laptop is required
- Please contact the Support center 2099 or SupportCenter@ama-assn.org with any questions

Loaner Laptop Specifications

The Technology Group maintains a pool of laptop computers for AMA employees who require a computer while away from the office on AMA business. Each laptop is equipped with:

- Power cable
- Charger
- Current version of Microsoft Office Suite
- Current version of Microsoft Internet Explorer
- Current version of Adobe Reader

All loaner laptops are subject to availability

User Information (Notes: * Indicates required field; ** Email fields require you to input name or email and select from list)

User's Name (Person)** <input type="text" value="Mark Cruz"/>	User's Telephone or Ext* <input type="text" value="4239"/>	User's Mobile <input type="text" value="312-498-4287"/>
User's Office No.* <input type="text" value="46270"/>	Budget Code* <input type="text" value="FCB"/>	Department Name* <input type="text" value="General Accounting"/>

Requestor Information

Requestor's Name (Person)** <input type="text" value="Mark Cruz"/>	Requestor's Telephone or Ext* <input type="text" value="4239"/>	Requestor's Mobile <input type="text" value="312-498-4287"/>
Requestor's Office No.* <input type="text" value="46270"/>	Date Required* <input type="text" value="12/9/2016"/>	Please submit this form at least 2 business days before the date that the loaner laptop is required. * Indicated as a shorter timeframe than 2 business days is not guaranteed.

Conditions of Use

- You are responsible for the laptop while it is in your possession. Please review the [Acceptable Use of Technology policy](#)
- You are not authorized to download or install any applications including music or games.
- You must return the laptop on the date stated or contact the Support Center at X5999 with your revised return date.
- You should not store PC, PII or PI information on this machine. If you are required to for business, you must remove it before returning the machine (include emptying recycle bin).
- If you must store data on this computer during use, you should insure that it is removed before returning the laptop. Immediately upon return, all data will be wiped.

Request Information

Currently are you using an AMA laptop? ☒ Yes ☐ No

Business Reason for Laptop*

Predicted Pick Up Date

Predicted Return Date

Additional Information

Need laptop on Friday for travel next week.

Workflow

☒ Ready for Pick Up

Pick Up Comments
Loaner #026 is ready in the PC Build Room on the 40th floor.

☐ Support Center Pick Up Confirmation

Pick Up Date

Pick Up Person

☐ Support Center Drop Off Confirmation

Drop Off Date

Drop Off Person

Support Only

Support Center Approver (Person)

Support Center Approval

Loaner Laptop No.

Support Center Approval Date

Approval Comments

Laptop is ready for Pickup.

Once you submit this form, you cannot edit the form.

[Go to Support Center Home page](#)

Pictured: AMA Intranet Web Form. An example web form created using Nintex with custom UI development. Forms use the same web font as the rest of the AMAtoday site. The AMA logo is consistent on all web forms, and form status is shown at the top right. People pickers are used for all fields that reference AMA employees. Fields locked based on the form's status are denoted by grayed-out boxes, and date fields have date selectors. Approvers are allowed to select only themselves (login validated). When approval is selected, the approval date is auto-populated.

ROI

Since launching its new intranet, the AMA has taken an active approach to measuring both metrics and user satisfaction. The organization does not track dollar-based KPIs, but it has established clear metrics against each of its primary goals.

KPIs

During a planning presentation at the project's beginning, team members told the AMA C-Suite executives that if 40% of employees were using the platform daily in the first quarter after release, the organization should consider the effort a success. As a point of reference, 4% of employees used the former platform on a daily basis. Based on current analytics, at least 54% of employees (more than 532) now access the platform daily.

Other notable before-and-after gains include the following:

- Increase in employee engagement and satisfaction. The baseline for this goal was based on adoption (daily use) and results of a future survey (see softer measures below). As noted above, the previous platform's adoption was 4%. The project goal was to increase that by 20–40%. Based on Google analytics data, an average of 532 users, or 54% of employees, now use the site daily.
- Increase in employee self-service engagement. The team has three primary KPIs for this goal:
 - Reduction in time spent populating key forms. The baseline was 10 minutes per form and the goal was to reduce this by 20%. Currently, users spend an average of 2–5 minutes per form — a reduction of at least 50%. With thousands of forms populated to date, hundreds of hours of employee time have been saved.
 - Reduced IT support center calls. The baseline was 1,800 calls and emails per month, and the goal was to reduce this by 10%. Today, there are an average of 1,438 calls and emails per month, representing a 19% reduction in call center calls.
 - Reduction in enterprise internal emails. The baseline was 7,500 internal emails sent per month (by the top 50 senders), and the goal was to reduce that by 10%. Today, the top 50 users send, on average, 6,231 internal emails — a reduction of 19%.
- Connect employees. The baseline was 330 monthly page visits to four business unit pages; the goal was to increase page visits to other business units by 50%. Today, the 18 business unit pages have received more than 10,000 total page visits — a 3,900% increase.
- Serve as an information gateway. The baseline was a 9% click-through rate from the intranet to other AMA business tools, and the goal was to increase that by 20%. Today, the click-through rate to the top five business tools (including time entry, wellness program, career planning and jobs board) has increased by 32%.

Softer Metrics

In addition to measuring numbers, it's also important to measure user satisfaction, which the AMA team also has done.

In June/July 2017, seven months after launch, the team surveyed all AMA employees about AMAtoday and Employee Communications channels. The objective was to solicit feedback on the new site and identify any areas for improvement. Nearly 300 employees (one quarter of all employees) provided feedback; the results revealed that satisfaction with the site has increased compared to the previous version. Further, a regression analysis of the survey data revealed that the two factors predicting overall satisfaction were the site's ease of use and the content's timeliness.

The preliminary findings include:

- Users are satisfied. Two-thirds of employees are satisfied or very satisfied with the new platform.
- Satisfaction grows with frequency of use. 82% of employees who use the site every day report that they are satisfied or very satisfied.
- Content is perceived as valuable. When asked about the site's content, 74% of employees said the content was valuable and 50% said it is "necessary for conducting day-to-day work."
- Content is good quality. More than 80% of respondents said the content is good, very good, or excellent.
- Site use spans several tools and functions. Respondents reported using AMAtoday to access tools for time reporting (69%), to keep up on what's happening at AMA (60%), and to search for a colleague using the org charts (53%).

Collectively, these results indicate that AMAtoday has helped bring the association into the modern digital age, with a platform that enables an efficient, connected, and collaborative digital workplace. The project replaced 27,000 pages of outdated content with 120 pages of fresh, regularly updated content that is relevant to users and reflects the association's smart, focused, collegial personality. The team will also use these findings to prioritize future improvements.

In May 2017, AMAtoday received a Golden Trumpet award from the Publicity Club of Chicago in recognition of its innovative format and capabilities as one of the AMA's primary internal communication channels. In June 2017, the site received an Award of Excellence from the Public Relations Society of America's Chicago Chapter. The project has also been selected as a finalist for the PR News Platinum Awards in the Employee Relations category.

LESSONS LEARNED

AMA team members share some lessons they learned and some advice for other intranet teams:

- Start the content review process early. “A good lesson learned from the team’s content process is: *start early*. This process is time consuming and requires significant time and attention from busy internal partners. Content assessment will be a new process for most business units, so create a structured, organized process with firm deadlines. Your site will only be as good as how relevant your content is to your audience. To reduce pages, create parameters for what constitutes a subpage and urge your content team to keep their copy concise without losing substance. Don’t reinvent the wheel; link directly to external resources, such as your corporate website.” (Alex Foucre-Stimes, West Monroe Partners, UX Lead)
- Involve the wider team in technology decisions. “Our core AMA team did not have any input in the organization’s decision to implement Office 365. Our staff was not familiar with Office 365 and was challenged to support the technology requirements for launching AMAtoday organization-wide (e.g., Seamless log in, Delve profiles). In addition, our staff did not have the same level of control over the Office 365 implementation that it did with the previous on-premise SharePoint application. This added risk to the project and resulted in frustration when we were not able to make changes or support production issues.” (Jordan Brandl, AMA, Senior Project Manager, IT Development Apps and Strategy)
- Change management is essential. “It is essential and it is important to plan for the substantial amount of time required to accommodate change management. For example, it has been difficult to get senior management to support the hybrid content governance approach. This has required the platform owner and manager to invest more time than anticipated in order to instill the new norms and to develop individual business unit’s value-propositions and visions for their pages within the site.” (Kristina Goel, AMA, Director, Leadership and Employee Communications)
- Content managers are an essential part of the redesign process. “We identified content managers at the time we assessed and developed content. In hindsight, we should have engaged them earlier in the initiative and treated them more as partners than as stakeholders.” (Goel)
- Keep an eye on projects that might compete for resources. “We learned that, for success to come early in the process, it is important to be aware of any competing enterprise-wide initiatives to ensure change readiness and adequate resources for supporting the launch.” (Goel)

Best Practices

The team also offered the following advice on best practices when starting a redesign project:

- Take a new hire’s perspective. “Favor the viewpoint of new employees, as the digital workplace will play a key role in successful onboarding and in enabling them to be effective in their roles early on.”

- Engage people across departments. "Form a cross-department product team comprised of people who can make decisions related to product and content."
- Focus on needed functions. "Make sure the platform connects employees with functions they need (benefits, support centers, payroll). Following organization structure is not always the most intuitive means for guiding users to that content."

UN World Food Programme (WFP) (2018)

OVERVIEW

COMPANY

The UN World Food Programme (WFP) is the leading humanitarian organization fighting hunger worldwide, delivering food assistance in emergencies and working with communities to improve nutrition and build resilience. Voluntarily funded, WFP assists 80 million people in approximately 80 countries each year.

Headquarters: Rome, Italy

Company locations: WFP works in about 80 countries across the world, including Africa, Asia, America, and Europe, with headquarters in Rome.

Locations where people use the intranet: In addition to staff in its Rome headquarters, WFP staff members access the intranet from approximately 90 major offices across the world.

THE INTRANET

Users: All WFP staff has access to the intranet, which holds all of the global and corporate documents used by numerous staff members around the globe. The intranet is also the main portal through which staff members access the phone/email directory and most of the other WFP systems and services.

Mobile approach: Responsive web design

Technology platform: Drupal 8

DESIGN TEAM

Approximately 11 people were involved in designing and building the intranet.

The three main team members, UX Manager Daniela Pizzurro, Project Manager Jordan Cox, and Transition Manager Mark Horrell, did stakeholder management, designed the CMS, oversaw development and testing, and led 100+ editors in transitioning their content.

Four external developers and one external graphic designer built the site with oversight from an internal tech lead.

The core team was helped by a taxonomist, who built a corporate taxonomy that the intranet uses as part of its IA; a user research firm that carried out phone and in-person research before design began; an intern; and two external trainers who built and led the two-day editor training courses.

INTRANET TEAM



Team members shown here (left to right): UX Manager Daniela Pizzurro, Project Manager Jordan Cox, and Transition Manager Mark Horrell.

HIGHLIGHTS ABOUT THIS WINNER

In myriad ways, the World Food Programme's intranet, WFPgo, makes clever suggestions for users by consolidating resources in menus and on pages. This mentality is standardized and reproduced in several page types. The inspired quick launch feature for applications makes it possible to open various services from the global navigation and from search results.

WFPgo is responsive, helpful, and even quite pretty. In contrast, the old intranet was dated, lacked content governance and mobile access, and users complained about its search results for years. Additionally, 45 different intranet sites each had their own design, tone of voice, IA, and navigation. Calling that intranet's design "inconsistent" would be a severe understatement.

A new chief of Internal Communications was the energy the organization needed to start the redesign. The new intranet does an admirable job with IA, aesthetics, making information and tools discoverable, and consolidating information in such a way that users can complete entire processes confidently and easily.

- **Quick access to apps.** A special content type lets users launch apps from the *Services* section page, as well as from the nontraditional megamenu and the search results pages. Creative minds turned common features into nontraditional launch pads, enabling employees to maneuver to the applications they need.
- **Topics and services.** Sometimes it can be difficult for employees to find all the available information and services — from invoice tracking to emailing via the Outlook web app. This is not the case on the WFP intranet. Service and topic pages are a standard and refreshing way to consolidate these offerings for employees. With these pages, employees are highly likely to take advantage of everything the organization has to offer.
- **Aesthetically pleasing.** “Pretty” isn’t an adjective one often uses to describe an intranet, but here the word is entirely apropos.
- **Helpful footer topics.** The very fat footer advertises links to topics such as food nutrition, emergency preparedness, leadership, and security. Because footer content has no rules — it doesn’t have to include a site map or links to social tools — the team took advantage of its flexibility and uses it to call out various unrelated but important topics.
- **Departments.** Recognizing the organization’s somewhat complex structure, the team created a list page of all departments, making it easy to fit together the pieces of the organization and get a macro-level perspective. On a micro level, users can find combined details about any department.
- **Acronyms.** The intranet supports the organization and its culture in countless ways. Because WFP has sundry frequently used acronyms, the acronym search is a key feature for new and seasoned employees alike.

BACKGROUND

By 2014, WFP’s intranet design was about seven years old and had become quite dated. The organization’s new chief of Internal Communications had just arrived and decided it was time to make a change. The site had no mobile support, and staff had been complaining about poor search results for years. Weak governance and an overly flexible CMS had led many mini-sites within the intranet to flourish, complete with their own IAs and custom, hacked-in designs.

The redesign project started out with a single purpose: connect employees to the organization and the tools they need to perform its mission. Included in that goal were several specific objectives:

- Get users to the right information easily to help them do their jobs
- Personalize content based on location and job type
- Improve communication between staff and management
- Encourage more field staff (outside the Rome HQ) to post content
- Present a more cohesive view of WFP to staff

The mission changed somewhat as the project progressed, but this was the fundamental plan as it began.

WFP colleagues who built the organization's external website (WFP.org) had moved toward UX in a major way starting in about 2013, as had seemingly every intranet the team members studied; they knew it was time to get more familiar with testing, user research, and UX than they ever had before.

Start by Finding High-Level Champions

At project launch, an Intranet Council was formed to give senior-level managers oversight of the redesign and help secure their blessing. The council comprised the chief of staff, senior division chiefs (IT, Policy and Program, Innovation, Communications, and HR) and a few country and regional directors (senior leaders in the field).

Next, the team hired Assist, a Milan-based user research company. Assist did extensive user research in Rome; took field trips to WFP offices in Egypt, Laos, Thailand, and Senegal; ran surveys; and conducted many phone interviews in multiple languages across WFP's regional offices.

This research identified the main universal pain points across all locations. The consulting team studied how users found information and provided many suggestions, ideas, and user requests for new features. This research gave the internal team early ideas about content types and how to structure the site, as well as ideas for the IA and functionality.

In parallel, the design team set up three working groups: knowledge management and taxonomy, technology, and UX. These groups were the main conduits between the design team and other parts of WFP that needed to be involved.

Around the same time the intranet research began, another WFP group was working to build a corporate taxonomy — one that is now in use across several systems. The intranet team took advantage of this parallel effort and linked it to its own IA efforts. The two groups shared tools and expanded the Intranet Council to also include taxonomy oversight.

In late spring of 2015, the intranet team discovered another effort that would help inform its work — the GOV.UK site. Because the history and approach of that site was so well documented by the Government Digital Service team online, the WFP team used that knowledge to help it expand what it saw as possible for the new intranet. Team members reasoned that, if a public service website could be on the cutting edge of usability and structured content, and successfully consolidate approximately 1,884 government sites into a single, beautifully designed site with the simplest, most understandable English they had ever seen, why couldn't they get a bit bolder with their choices, too?

Goals

When the first big Intranet Council meeting rolled around in July 2015 and it was time for the intranet team to share an update on its progress, it found that a few of its original goals were either out of reach technically, not absolutely needed by users, or both. WFP Communities, the internal social network that makes up another part of the intranet, had taken up content personalization; it was also the main place for field staff contributions. This meant that the WFPgo team could focus more on

making HQ's corporate information as simple and understandable as possible to all users. At the July 2015 meeting, the team therefore shared its simplified goals:

- Organize the intranet around themes that make sense to most users
- Ensure that the most important information lives on the web first
- Make the intranet mobile-friendly
- Establish *clarity* and *usefulness* as the new global-level standard

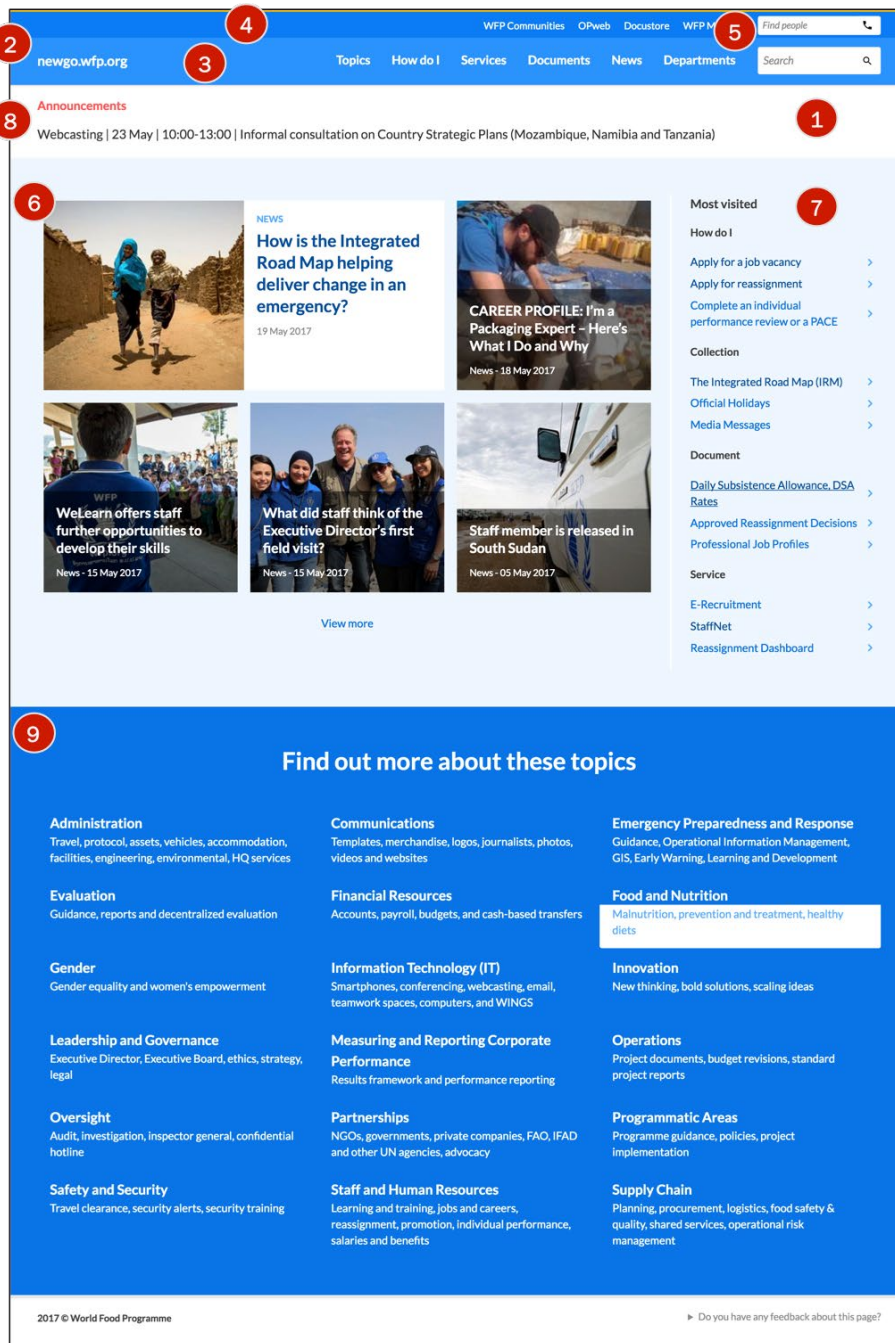
By the fall of 2015, the team was getting closer to starting an actual prototype in Drupal 8 and had a better sense of how the site might be structured — but it still had a ways to go.



Pictured: WFP Intranet Old Homepage. The old WFPgo homepage had an old fashioned look and feel, overwhelming navigation, and a cluttered environment.

DESIGN REVIEW

Homepage



Pictured: WFP Intranet Homepage. The homepage of WFPgo, the WFP intranet, serves news and the most-visited links in an appealing visual grid.

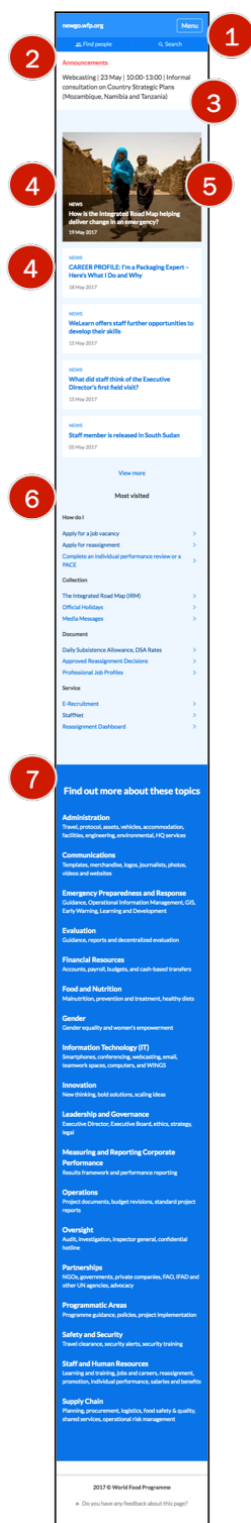
Homepage Highlights

A simple grid and attractive aesthetic packages news, most popular links, and topic links.

- 1. Visual appeal.** The WFPgo homepage is very easy on the eyes. A consistent grid and square and rectangular shapes are the foundation of this stylish design. White, black, and shades of blue comprise the color palette, which creates a soothing vibe.
- 2. Navigation.** Across the top of the page, in two slightly different shades of blue, are the utility bar (on top), and the global navigation bar (below it).
- 3. Global navigation.** The global navigation is available on each intranet page. Links for Topics, How Do I, Services, Documents, News, and Departments cover the gamut of content types that employees might need.
- 4. Utility bar.** The utility bar links to other internal WFP sites, including communities, documents and manuals, and more. These links take up little screen real estate, but are a big win for employees who frequently access these sites. The small toolbar acts as a mini-portal, consolidating links to important sites in one place. Items in the utility bar include the following:
 - *WFP Communities*, the social collaboration platform that helps staff connect, discover, and share information with colleagues around the world.
 - *OPweb*, the Corporate Operations intranet for operational information.
 - *Docustore*, the corporate documents repository where approved versions of documents are stored, with links to and from other sites.
 - *WFP Manuals*, a web-based service for publishing online manuals, user guides, and handbooks.
- 5. Site and people search.** Nodding to the Gestalt proximity principle, designers stacked the two related search fields — people search and site search — on top of one another. This vertical, adjacent arrangement makes it less likely that employees will type a query in the wrong field. No matter which field the users locates first, they will also see the other field and realize they should make a choice. Also differentiating the fields from one another are the visual cues: the labels *Search* and *Find people*, and the magnifying glass and telephone icons.
- 6. News stories.** The six large squares in the main content area display news article headlines, attractive images, and the article's publication date (with the month spelled out for international design). The main news item is allotted two of the six squares, with another four squares for the other four stories. The *View more* link below the articles leads to the main

news/landing page (which also includes news articles that don't make the homepage cut).

- 7. Most-visited links.** Great minds think alike — and thus often look for the same information. The WFP intranet helps make it easy for users to find popular links by listing the 12 most-visited links. This list of links is easy to see and access in the homepage's right rail — a position that is becoming a somewhat standard place to put popular or custom links because the location makes them readily available. The list here is labeled Most visited, explaining why the links are in a prominent position. They are divided in sets of three under their respective content types: How do I, Collection, Document, and Service.
- 8. Announcements.** Employees are kept abreast of timely events in various departments at the top of the homepage. These announcements are clickable and lead to more information.
- 9. Fat footer.** The large blue section at the bottom of the page is the fat footer, which shows relevant high-level topics from the corporate taxonomy. Pages about important topics, which can also be found via the navigation and search, are advertised here.



Home, Mobile

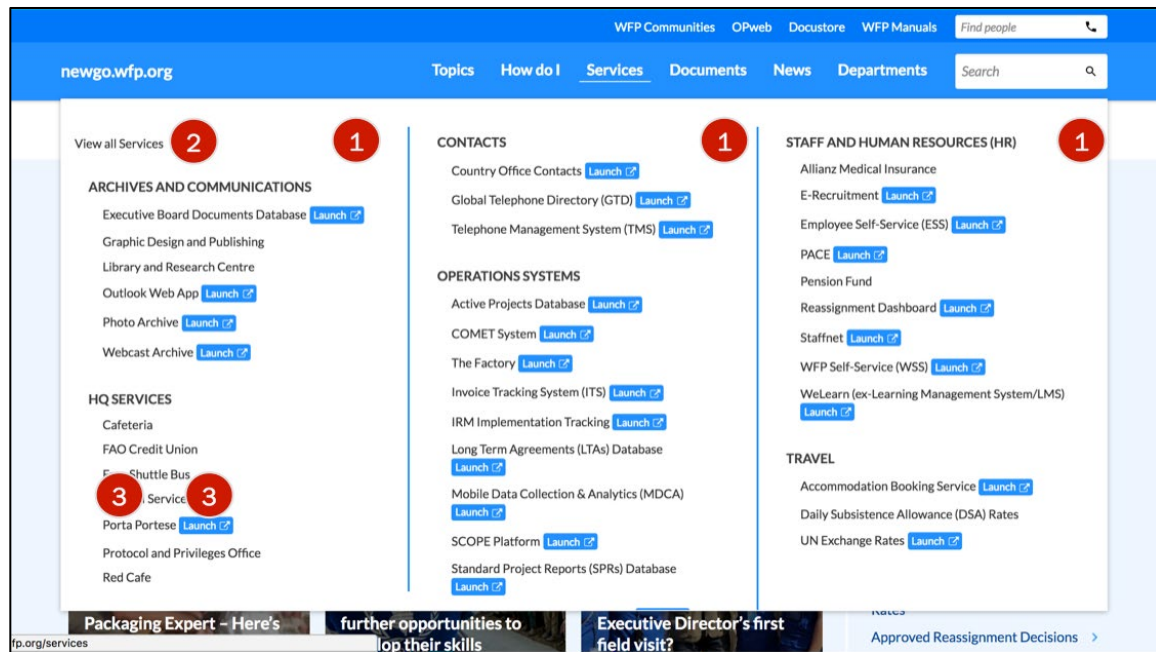
Pictured: WFP Intranet Mobile Homepage. All but one of the news story images are left out of the mobile design, which makes the WFPgo intranet load quickly on mobile.

Home Mobile Highlights

The design team massaged, moved, and sometimes removed elements to make this responsive intranet fast and efficient, and display in a single column on mobile.

- 1. Global navigation.** To effectively use the scant screen real estate on a mobile phone, the global navigation is collapsed under the *Menu* button in the upper right. The hamburger icon is familiar to many, but designers made the safer choice here with the *Menu* button, as not all users understand the hamburger icon. The utility bar is not available on smartphones. Designers found that accessing another platform via WFPgo was unusual, because users outside the WFP network must either tunnel in or enable the VPN. Designers also discussed the complexities typically entailed in using three-layer navigation on a small device, so they chose to omit the utility bar.
- 2. Site and people search.** The people search and site search features are arranged horizontally instead of vertically to maximize screen space.
- 3. Announcements.** The announcements are displayed at the top of the screen, so they're hard to miss.
- 4. News.** One news story is showcased at the top, with four other news story headlines listed below it; the *View more* link leads to all news items.
- 5. Images.** To make the intranet light and load quickly, designers chose to display only the first featured story's image on mobile.
- 6. Popular links.** The *Most visited* links section drops from the right rail position on desktop to below the news on mobile.
- 7. Fat footer.** All the desktop footer's links also display on phones, but as a single column of links.

Megamenu



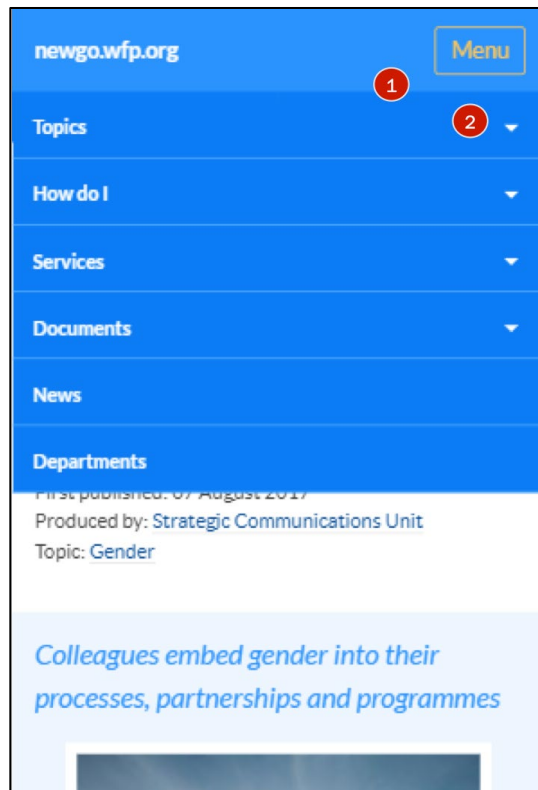
Pictured: WFP Intranet Megamenu. Employees can link to pages, read descriptions of apps, and launch apps directly from the megamenu.

Megamenu Highlights

This atypical megamenu allows employees to open pages, read about services, and launch apps easily.

- 1. Sections.** The links are divided into sections, with subheadings in bold and all capital letters to signpost each set.
- 2. All services.** More platforms and services are available than are listed in this menu; the *View all Services* link in the upper left leads to a page of additional services.
- 3. Open apps and pages.** Links and buttons make this intranet a great facilitator to other platforms and services. With the help of a special content-type feature (*Services*), the web-based apps and tools are mapped to descriptions about what they are and what employees can do with them. The black text links lead to pages, while the blue *Launch* buttons open an application or service. So, users who know which service they want can launch it from the menu, without going through the intermittent step of going to a webpage, then accessing the app from there. Employees who are not sure about what a service is, however, can follow the link and read about it, then open it from that page. The launch buttons are available on the megamenu, on the *Services* main page, and in search results within the short description.

Mobile Navigation Menu



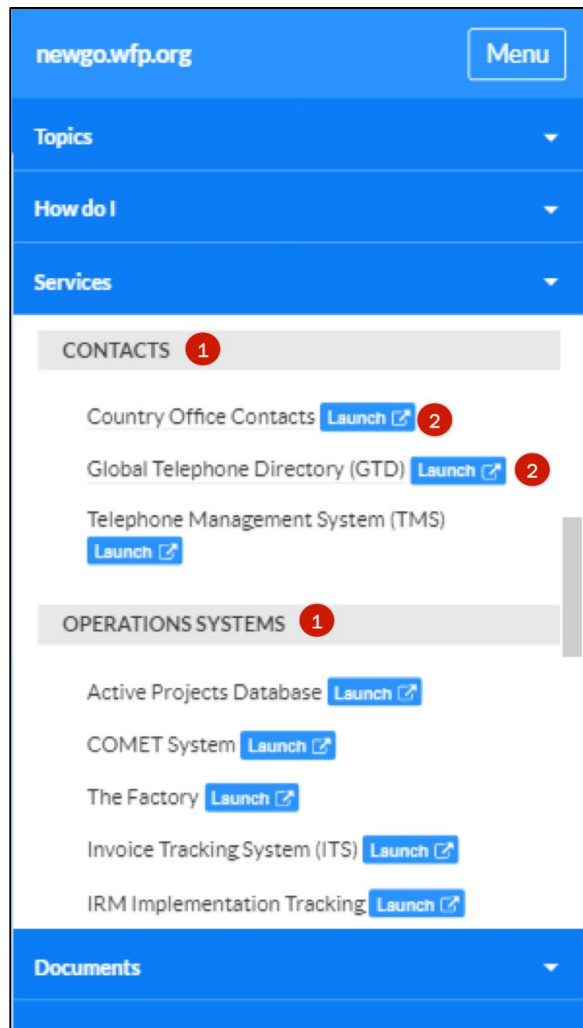
Pictured: WFP Intranet Mobile Navigation Menu. On mobile, tapping the *Menu* button opens the accordion menu with the sections collapsed.

Mobile Navigation Menu Highlights

The menu is changed to accommodate mobile:

- 1. Collapsed sections.** The links within the accordion menu correspond with the desktop's tier-one menu. Sections are collapsed by default; this avoids clutter, overwhelming users with choice, and issues that come with scrolling a long menu on a small touchscreen.
- 2. Expand icon.** A small standard down arrow communicates which menus are expandable.

Mobile Navigation Menu Opened



Pictured: WFP Intranet Mobile Navigation Menu Opened. Menu links are sorted in categories on mobile on the WFP intranet.

Mobile Navigation Menu Opened Highlights

The accordion menu expands and collapses with the standard arrow icon.

- 1. Tier two.** Headings within the menu make it easier to scan the topic links.
- 2. Open apps.** As on desktop, the *Launch* button launches the app, while the black links open the related service's web page.

Services Pages

newgo.wfp.org

TopicsHow do I**Services**DocumentsNewsDepartments

Find people

Search

[Services](#) > Graphic Design and Publishing

1

Graphic Design and Publishing

Last updated: 26 May 2017
Managed by: [Graphic Design and Publishing Unit](#)
Contact: [REDACTED]
Topic: Communications, Branding, Publishing

1

Guidance and support on publication production, logos and branding.

2

What you need to know

We can help you with ...

- Advice on preparation, production and distribution of WFP corporate communications products.
- Information on WFP publishing standards and practices.
- Guidance on [branding](#) and logo usage.
- [Templates](#) to create your own communications products
- To request support contact us [\[REDACTED\]](#)

3

Things you can do with this service

- [Create a publication](#)
- [Create and display posters in HQ](#)
- [Design an infographic](#)
- [Download WFP-branded templates](#)
- [Set up an official WFP social media account](#)
- [Understand the WFP branding guidelines](#)
- [Use the different logo types](#)
- [Use the electronic screens in HQ](#)





Photo: Pexels.com

 [Print this page](#)

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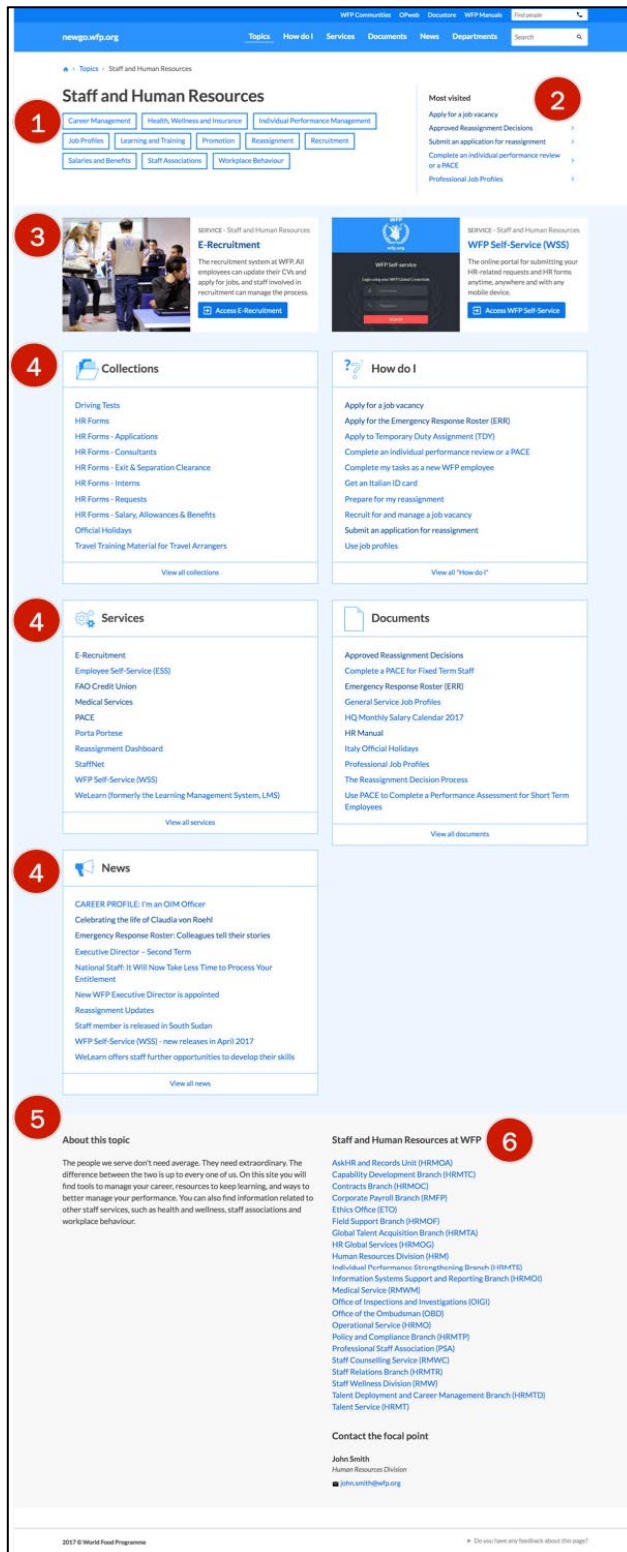
[Login](#)
Do you have any feedback about this page?

Pictured: WFP Intranet Services Page. The *Services* page for graphic design offers links to resources and advice for using the service.

Services Pages Highlights

WFP employees are supported by many internal services and apps, including recruitment, pension fund, medical services, invoice tracking, library, and research. *Services* pages describe amenities and related activities and apps, making each service page a one-stop shop. Employees — especially new hires, who are not aware of which services are available or how to access them — can go to the respective service's page or even the main *Services* section page, which bridges WFPgo with other apps and sites.

- 1. About.** The *Graphic Design and Publishing* page is an example of a service page on WFPgo. The page lists the service's name as the page title. Information at the top of the page includes the team that manages it, related topics, and a tagline — *Guidance and support on publication production, logos and branding* — providing further insight about what this service is about. The contact information is easy to find (also in the page's top section), and the topics aid the search function.
- 2. Service benefits.** *What you need to know*, the title of the page's next section, is very explicit and makes people want to read it. It describes in simple language what the group can help people with, using bullets to make the information easy to digest.
- 3. Enabling employees.** The *Things you can do with this Service* section offers a list of tasks drawn exclusively from the *How Do I* content type. These links appear automatically when someone adds a service or document as a related link to a *How Do I* page. In other words, when taking users through the steps to complete a task, it asks users to link to the other tools (be they services or documents) they use to complete that task. Once they do that, it automatically displays the link to the task (*How Do I*) on the service or document page. Thus, users who land on the service or document get an automatic list of the tasks they can do with it. In the example shown here, several valuable capabilities surround the tasks, such as setting up social media accounts, using brand templates and logos, and creating display posters. Offering these on the intranet helps employees create the marketing materials they need under the tutelage of experts.



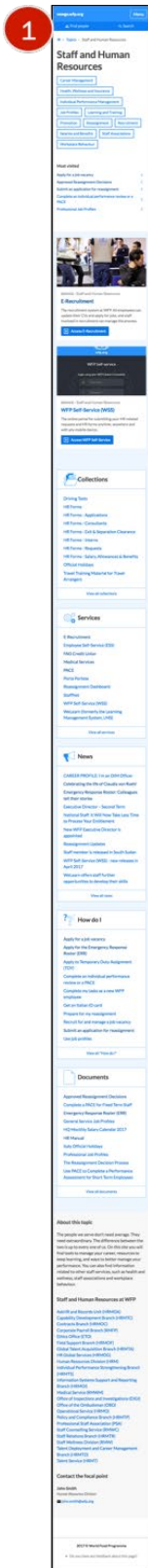
Topic Pages

Pictured: WFP Intranet Topic Pages. On topic pages, such as the *Staff and Human Resources* page, five main sections consolidate all the information employees might need about a topic.

Topic Pages Highlights

Each topic page consolidates all types of information and media about a subject. Users can reach topic pages via the footer and global navigation.

- 1. Topics.** The related topic pages appear in buttons at the top of the page, suggesting to users other areas they might want to peruse.
- 2. Most visited.** To get a sense of which pages are most often used, employees can look to the *Most visited* links section in the upper right. This cultivates the assumption that if colleagues needed this, maybe I do, too.
- 3. Top tools.** Descriptions of and access to the vital tools related to the topic appear near the top of the page.
- 4. Main sections.** Five main sections consolidate all the information employees might need about the topic. These sections are *Collections*, *How Do I*, *Services*, *Documents*, and *News*.
- 5. About.** A clear description of the topic appears in a short summary statement.
- 6. Groups.** Various groups related to the topic are consolidated in a list of links. This list boosts the discoverability of related resources.



Topic Pages, Mobile

Pictured: WFP Intranet Topic Pages, Mobile. On mobile, topic page sections and lists flow to a single-column layout, prioritizing the most important content.

Topic Pages, Mobile Highlights

Topic pages are elongated to accommodate the single-column layout on mobile. The content that is most important to users appears first.

1. Order. The order of sections on mobile topic pages remains almost identical to that on desktop, but drops the right-column content.

Departments List

The screenshot shows the WFP Intranet 'Departments List' page. At the top, there's a navigation bar with links like 'Topics', 'How do I', 'Services', 'Documents', 'News', and 'Departments'. Below this, the 'About WFP' section is visible, with a red circle 1 highlighting the 'About WFP' link. A search bar for departments is highlighted with a red circle 2. On the left, a list of departments is shown, with a red circle 3 highlighting the 'ED' (Executive Director) department. On the right, the detailed view of the Executive Director's departments is shown, with a red circle 4 highlighting the 'ED' header. The list includes various offices and branches, such as 'ETO Ethics Office', 'HRM Human Resources Division', 'INC Innovation and Change Management Division', 'OIG Inspector General and Oversight Office', 'LEG Legal Office', 'OEV Office of Evaluation', 'OBD Office of the Ombudsman', 'RBB Bangkok Regional Bureau', and 'RBC Cairo Regional Bureau'.

1 About WFP

WFP is led by Executive Director [David Beasley](#). There are 83 country offices and 6 regional bureaux to oversee them. WFP Headquarters is in Rome, Italy. Headquarters is organized into five departments, which are made up of many different divisions and units. See below for their **acronyms**.

For names and photos of the **senior management team**, including heads of all departments, divisions and regional bureaux, see the [WFP Organigram](#). For a map of WFP offices worldwide see the [Global Presence Map](#).

See [contact people and offices at WFP](#) for various ways of **getting in touch with people** within WFP.

If you want to **register** or **change** information about your unit, read the [steps to follow](#).

Quickly find an acronym or group

2

3

4

ED Executive Director

ETO Ethics Office

HRM Human Resources Division

HRMT Talent Service

HRMTC Capability Development Branch

HRMTA Global Talent Acquisition Branch

HRMTS Individual Performance Strengthening Branch

HRMTP Policy and Compliance Branch

HRMTR Staff Relations Branch

HRMTD Talent Deployment and Career Management Branch

HRMDO Operational Service

HRMDOA Ask-HR and Records Unit

HRMDOC Contracts Branch

HRMDOF Field Support Branch

HRMDOG HR Global Services

HRMDOI Information Systems Support and Reporting Branch

INC Innovation and Change Management Division

INCA Innovation Accelerator

OIG Inspector General and Oversight Office

OIGA Office of Internal Audit

OIGI Office of Inspections and Investigations

LEG Legal Office

LEGA Administrative and Employment Law Branch

LEGC Contractual and Constitutional Law Branch

LEGH Maritime, Transport and Insurance Law Branch

OEV Office of Evaluation

OBD Office of the Ombudsman

RBB Bangkok Regional Bureau

AFG Afghanistan Country Office

BGD Bangladesh Country Office

BHU Bhutan Country Office

KAM Cambodia Country Office

KDR Democratic People's Republic of Korea Country Office

IND India Country Office

INS Indonesia Country Office

LAO Laos Country Office

MYA Myanmar Country Office

NEP Nepal Country Office

PAK Pakistan Country Office

PHI Philippines Country Office

SRL Sri Lanka Country Office

TLS Timor-Leste Country Office

VAN Vanuatu Country Office

RBC Cairo Regional Bureau

ALG Algeria Country Office

ARM Armenia Country Office

Pictured: WFP Intranet Departments List. The *About WFP* page includes the names of all departments, how the organization is structured, and acronyms for each department name.

Departments List Highlights

Accessed via the *Departments* link in the global navigation, the *About WFP* page includes a complete list of WFP's departments and the organization structure. It is somewhat like an organization chart, but in a list format.

- 1. About.** A basic description of how the organization is organized, along with links to related pages, appears at the top, setting the stage for the rest of the page.
- 2. Search.** This speedy search queries only the items on the list. As the user types letters, the page automatically displays only the results that match. This search is very important at WFP because there are hundreds of acronyms used on a regular basis. Most parts of the organization are identified by an acronym, including the headquarters, which is organized into several departments each made up of dozens of different divisions — divided into about 129 units in all — plus 83 country offices and 6 regional bureaus. As you may imagine, acronym search is one of the top tasks for this intranet.
- 3. Acronym list.** This list on the left provides in-page navigation down the very long list of acronyms.
- 4. Department list.** Here, users can find and learn the acronym for each department, or click the link and go to that department's page.

Department Pages

newgo.wfp.org

Topics How do I Services Documents News Departments Search

About WFP PG PGM

Communications Division (PGM)

1 The Communications division enhances the impact of WFP's mission and work, and WFP's reputation and image through efficient and effective internal and external communication.

1 Who we are and what we do

Our division strives to provide immediate access to the documents, guidelines and information needed to communicate our mission effectively to the world. Regardless of your division, we encourage you to take advantage of the resources we produce to help our colleagues, donors and beneficiaries understand the important contributions we make.

You can see a full list of staff and our division's structure in the [Communications Division Organigram](#).

This division includes

- Copenhagen WFP Office (COP)
- Graphic Design and Publishing Unit
- Media Team
- London WFP Office (LON)
- Photo Unit
- Strategic Communications Unit
- Video Unit

2

Corinne Woods
Director of Communications
Rome, third floor, green tower

3 Topics

Communications

4 Our News

- Bureau Film Shares IRM Workshop Approach
- Country Directors Talk IRM Implementation With Pioneers
- The IRM & Me: Bridging gaps between results and resources
- ED returns to Southern Africa, visits Madagascar

Our Documents

- The Path to Zero Hunger - The Integrated Road Map Leaflet
- IRM Newsletter Spring 2017 1
- Communications Division Organigram
- Why the Integrated Road Map? Why Now?
- Partnership Guidance on Country Strategic Plans (CSP)
- Merchandise Catalogue

[View all documents](#)

Our Services

- Donor Visibility Site
- Merchandise

Our "How do I"

- [Find accommodation in Rome](#)
- [Contact people and offices at WFP](#)
- [Buy merchandise](#)

Our Collections

- All Communications Templates
- The Integrated Road Map (IRM)

2017 © World Food Programme

[Editor login](#)

Do you have any feedback about this page?

Pictured: WFP Intranet Department Pages. Each department, division, and unit within the headquarters has its own page.

Department Pages Highlights

Employees can familiarize themselves with their organization and what each department does as each department, division, and unit within headquarters has its own page.

1. **About.** The page's top section clearly describes what the department does and which teams are included within it. Each department also has its own organization pages.
2. **Leader.** The group leader, along with a photo, job title, and office location, appear in the page's upper right. Putting a face to the team makes the page feel more personal.
3. **Topics.** If the team provides content for or works on specific topics for the intranet, these topics are listed here. This is also how the team controls the list of departments on each topic page, by associating topics to departments.
4. **News and resources.** These sections have clear titles and list the department's recent news, documents, services, *How Do I* content, and collections.

Feedback Form

The screenshot shows a feedback form titled '2017 © World Food Programme' in the top left. In the top right, there is a link for 'Editor login' and a link that says '▼ Do you have any feedback about this page?'. The form contains two main sections. The first section is labeled with a red circle containing the number '1' and asks 'Can you provide more detail?'. Below this is a large text input field labeled with a red circle containing the number '2'. Below the first section, there is a small text prompt: 'For example: what you were doing and what went wrong.' The second section is labeled with a red circle containing the number '1' and asks 'Please leave your email address so we can follow up and resolve the issue for you.' Below this is an email input field labeled with a red circle containing the number '2'. Underneath the email field is the text 'Enter your email address above and we'll get back to you quickly.' At the bottom of the form is a blue 'Send' button.

Pictured: WFP Intranet Feedback Form. The feedback form was inspired by one the team studied on the www.GOV.UK website.

Feedback Form Highlights

The feedback form is accessible from the *Do you have any feedback about this page?* link that appears at the bottom of each page. Inspired by the same feature on GOV.UK, the feedback form collects employees' ideas, opinions, and bug reports. The submissions are stored in the CMS, and the intranet team checks it daily and aims to respond to people within 24 hours. The feature was very helpful when the site launched and continues to reap valuable suggestions.

- 1. Labels and notes.** Notes below the fields give more guidance, such as telling users to describe what they were doing. They also ask for the user's email address so the team can ask questions and respond. The mention of a response suggests the relationship is reciprocal: the user gives a suggestion, and the team responds quickly.
- 2. Fields.** The large fields indicate that users don't need to edit themselves when offering feedback.

DESIGN PROCESS AND USABILITY WORK

User Research by the External Team

In the project's first phase, WFP hired an external company to carry out research. These efforts included:

- 11 1:1 interviews sessions with top managers in HQ and regional bureaus to collect feedback on the existing gaps of WFPgo and the expectations for the future intranet portal
- 80 remote phone interviews with WFP employees worldwide
- Ethnographic observations in four different locations: the regional bureau in Cairo, and country offices in Laos, Thailand, and Senegal
- 10 1:1 interviews sessions with WFP staff from various divisions in the HQ office to collect feedback on daily work activities, their use of the intranet, and existing gaps on WFPgo
- An online survey sent to all WFP staff members

This research helped the team identify the pain points for users, such as the search engine; the fragmented and outdated site information; the structure, which resembled the HQ structure too closely; the lack of link categorization; the unfulfilled expectation of multilingual content; the lack of personalization and/or targeted global versus local content; and no mobile accessibility.

The agency also proposed an information structure for the future intranet content based on three main clusters of content types: informative, operative, and supportive. Finally, the agency presented basic mockups of the navigational model and interaction design elements.

A Need for More Research

Most of the data collected by the outside agency was qualitative, and the team felt it needed quantitative data as well to help it prioritize the pain points identified by users. There were just too many issues, and it would have been impractical to tackle them all at once.

As for the content types, while the clustering proposed by the UX company made sense, in general, the internal team struggled to adapt them to the existing intranet content. Moreover, the team did not actually have content for some of the subtypes suggested.

Lastly, it would not have been reasonable to build a site with a high degree of interactions and personalization because of the organization's low-bandwidth in field offices, where a big portion of the staff is located.

The Internal Team's User Research

The internal team began its own additional user research efforts in August 2015. One of its first steps was to run a series of usability tests on the old intranet. Although team members knew the old site would be shut down, they wanted to extract data they could use as benchmarks against the new intranet's performance.

With that in mind, they conducted usability tests on the old intranet with 20 participants (55% women and 45% men). Approximately 50% of participants had worked at WFP for more than three years, 17% had been at the organization for 1–3 years, and 33% had been employed for less than a year. Nearly all participants used the intranet regularly; only two said they used it infrequently.

These tests, coupled with regular monitoring and analysis of the site's Google analytics data, made it clear that the main pain points the team needed to fix were the IA and the search engine. It therefore initiated its work on the new site by focusing on the content types required to provide structure.

First, team members scanned the existing content of different groups on the old site to see which, if any, content types were used, as well as to find common or shared content types. They also drafted a list of content types and tried to map existing content against them. These types were:

- Corporate documents
- Services and tools
- News and announcements
- Organizational and corporate units

At the same time, they piloted a user research process for the old intranet's *Communications* section. This research was aimed at:

- Investigating the needs and expectations of both the users interacting with the COM division and its employees
- Understanding which content drives site traffic and what users are looking for that isn't available or could be better provided
- Prioritizing the new *Communications* section by auditing and subsequently rewriting or reframing the content

The research consisted of several methodologies:

- An online survey sent to the organization's communications community (more than 100 surveyed; approximately 60 responses returned)
- Contextual and remote interviews (11 interviews with staff members worldwide)
- Interview sessions with the heads of units within the Communication Division
- Web analytics
- User testing
- Content audit

The team also used other methods, both quantitative and qualitative, to apply a "data triangulation methodology" to validate outputs by cross-verifying the same information. The research gave team members useful insights into their users, the content they most often used and looked for on the intranet, and three top usability issues:

- Findability
- Readability
- Reliability

Using Research to Solve Problems

The research also helped the team identify recommendations and solutions to solve these issues, including the following:

- **Recommendations to address findability:**
 - Make the most-used content more visible
 - Make sure it is categorized properly for the search engine
 - Adopt three navigation models: by content type, by topic, by division
 - Conduct an open card sort on items if any major navigation problems arise
- **Recommendations to address readability:**
 - Use simple language before going into technical detail and don't use jargon
 - Make content more concise; short sentences are easy to read
 - Make the internal content and labeling more consistent
- **Recommendations to address reliability:**
 - Make it clear that content is the latest, up-to-date version
 - Keep the site up-to-date
 - Audit the content periodically
 - Ensure the owner of each section is clearly stated
 - Check the links to ensure they work

The team also gained valuable insights into how users consume content; these insights guided them in developing content rules, such as:

- Limit the use of PDFs to long reads; use HTML pages over PDFs, especially for short- to medium-length text
- Provide contextual summaries of long research reports
- Make web pages printer-friendly

Prototype Phase

Even after conducting all of this detailed analysis, team members felt they were still missing critical information that would help them optimize the content reorganization. So, in December 2015, they built a prototype: a Drupal instance with a very limited front end that would let them test and play around with the back end and content types. For two months, they iterated on the content type design, focusing on fields and attributes. They also focused on use cases, as they quickly

realized that the first ones they had drafted were too loose. In an effort to remedy this, they ran various card-sorting exercises to test the content types and subtypes.

Next came low-fidelity mockups of the master templates (homepage, topic page, content types, departments). They usability tested these using interactive PDFs and held meetings to present, discuss, and get feedback from other colleagues.

In March 2016, team members started building the site's first staging version. Because editor trainings were set to start in May, they had the first editors use the staging version and populate it with real content. Editor feedback was crucial in refining both the front and back ends, so the design team spent time during this period improving the site's authoring experience.

Once the site had a sufficient amount of content, team members conducted another round of usability tests on the live site, along with a separate session for mobile tests. The mobile tests, especially, were critical in helping them spot bugs and errors.

INFORMATION ARCHITECTURE

IA: From Chaos to Order

The previous intranet comprised approximately 45 different sites, each with its own IA, look and feel, tone, and voice. This resulted in a disruptive experience for employees trying to navigate the site.

Previously, whenever an office had wanted to publish new intranet content on its work, a new project, or a section of the organization, it would request — and pay — IT for a separate site and, with little governance and only basic guidelines, they would build it.

The requesting parties decided the type of content, including the tone and writing style, the brand, the site navigation, and its maintenance. Some of these sites adopted a topic-based navigation, while others created their sections based on their position in the org chart (e.g., their unit or division name).

As the owners of the overall intranet, the Communications division reviewed these sites before they went live, but focused mainly on writing and labels — and often came in too late in the process (after IA was decided and content completed) to really be helpful. When the intranet was still quite small, this didn't seem like a huge problem, but by the time it had grown to 45 subsites, the gap in governance was clear, as was the need for a different approach.

A Unified Approach to Content Types

With the new intranet, the team took the opportunity not only to update the design and infrastructure, but also to change the way editors used the platform and to foster collaboration among them. The new intranet gives editors a set of content types to choose from: *News*, *Service*, *How Do I*, *Document*, and *Organization*, and each content type has a set of fields and serves a specific use case.

Because many people are reluctant to read manuals and/or consult guidelines on other platforms, the team decided to incorporate some guidelines into the CMS itself, so that editors could see them when they need them.

All editors from all offices use the same content types, and WFPgo is full of templated and standardized information that brings with it a number of benefits:

- Consistent information packaging and presentation
- Consistent naming conventions for similar content types (no more “resources” vs. “documents” vs. “key pages” vs. “tools” that all contain the same thing)
- Consistent look and feel
- Content type templates eliminate the need to code or style pages and for technical teams to maintain them

A tagging system lets authors feature any document on different site sections, depending on the associated topics. This prevents content duplication. Editors can also tag their documents with any topic they think is relevant, which also makes the documents appear on related topic pages.

Topic Pages

Topic pages are probably the most important pages on WFPgo, as every page is associated with at least one topic. The site has 18 main topics, some of which have many subtopics under them. Each topic and subtopic has its own WFPgo page, and the team built a hybrid approach to ensure these pages are populated with the most relevant content for users. This hybrid approach offers two options for curating pages:

- **Manual:** every link is on the page because an editor manually selected and added it.
- **Automatic:** every link is powered by Google Analytics (based on the number of page views) and then sorted alphabetically for display.

The automatic content population covers cases in which editors are not very active in curating their topic page(s); in such cases, the pages are not left blank, but will display the most-viewed content for that specific topic.

Taxonomy-Based Content Organization

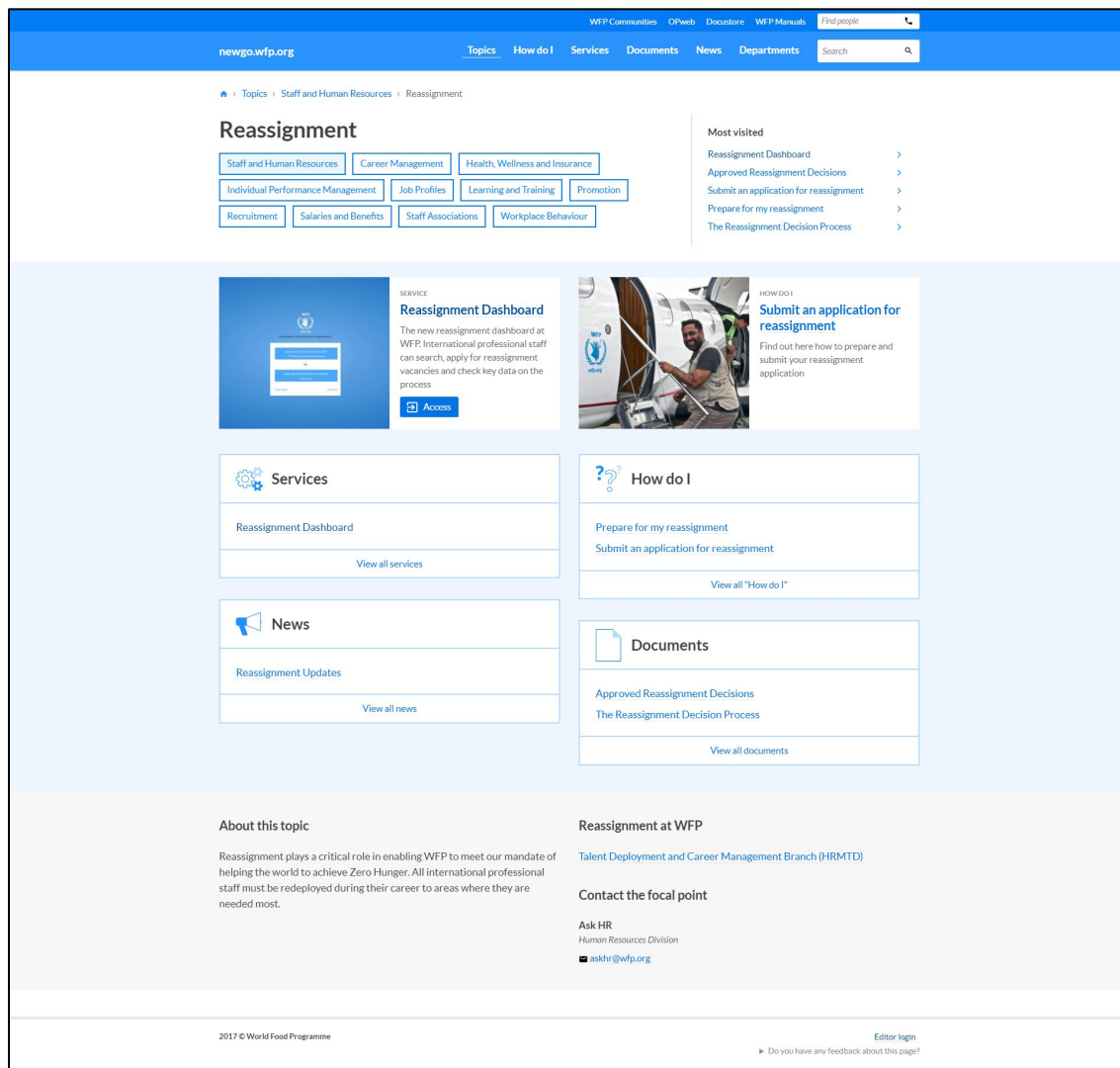
The external company hired at the project’s start carried out the first UX activities on the IA. It proposed a content structure that followed a single model of organizing information. For example, if users visit the intranet to access documentation, there will be a single access point to all existing resources and tools. When team members tried to apply these concepts to the organization’s existing content, however, it didn’t work, so they did further research on their own.

During the design team’s usability tests on the old site, it noticed that users did not use a single navigation model, and that they frequently used the topic-based navigation. The problem with the old site’s topic-based navigation was that it reflected the organigram (a graphical representation of the structure of an organization) too much, so it did not make sense to users — particularly non-HQ staff and new employees. Clearly, the team needed to reorganize the topics in a more straightforward way.

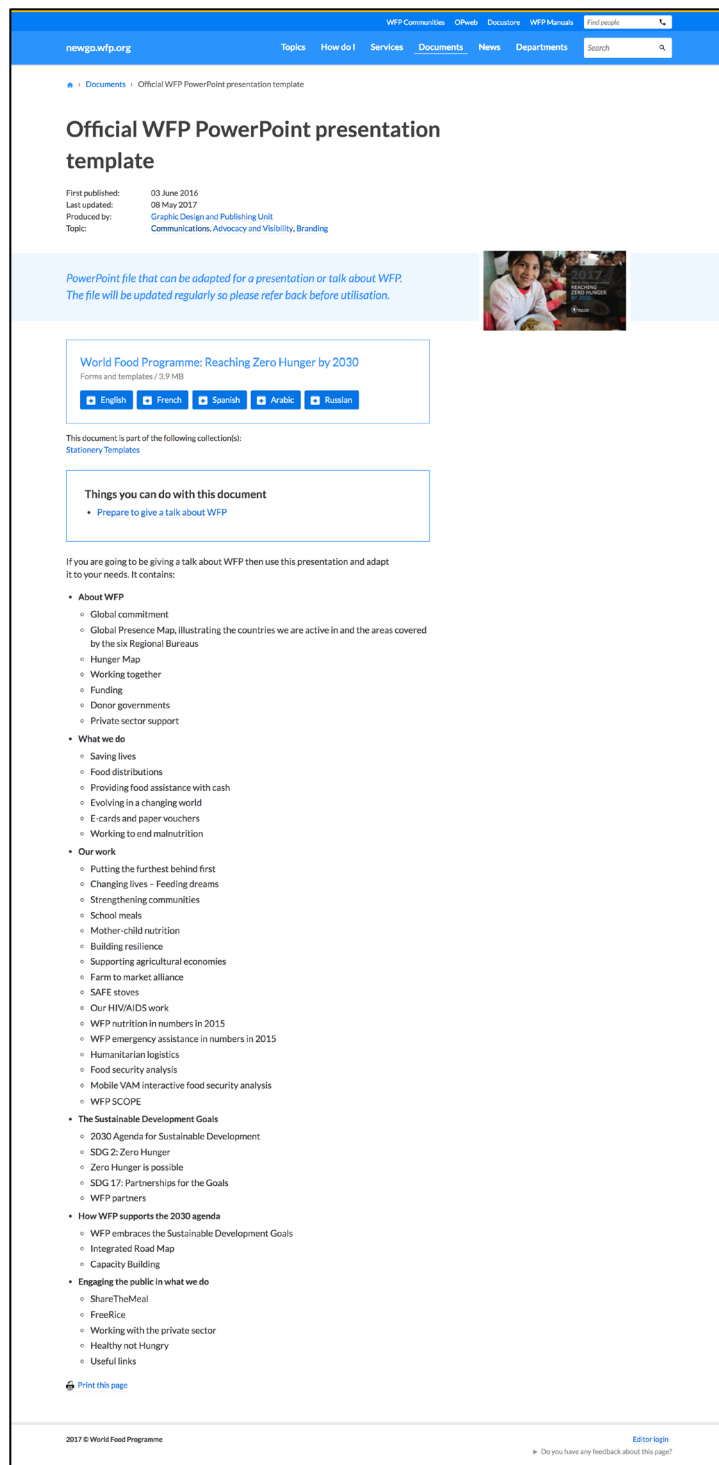
At the same time, a colleague in the Library and Research Office was working on a new corporate taxonomy to classify all of the corporate documents and replace the

old document management system with a new one. The intranet team thus formed a project work group to collaborate and follow up on the corporate taxonomy, in anticipation of future integrations between WFPgo and the new document management system. Through this process, the team realized it could share the same taxonomy.

The taxonomy group engaged in a diligent process to create the new corporate taxonomy — including more than 100 consultations, interviews, and card-sorting exercises — which took about a year and a half. Card-sort exercises, done by the intranet team for a few key areas, revealed results that were not that different from the corporate taxonomy. The two teams ultimately agreed that the benefit of sharing the same taxonomy between systems used by the same editors and consulted on by the same people was more important than any minor differences, so the intranet group thus adopted the corporate taxonomy.



Pictured: WFP Intranet Subtopic Page. This is one of the WFPgo subtopic pages. This page works like the main topic pages and shows up on the parent topic page.



Pictured: WFP Intranet Document Page. An example document page. This content type is used both for publications and guidance type documents. The template lets users upload other language versions of the same document if available.



Pictured: WFP Intranet Document Page Mobile View. The mobile version of the document page.

WORKING WITH OUTSIDE AGENCIES	
Agency	Project Role
Assist SpA	<ul style="list-style-type: none"> Conducted the majority of user research activities, including site visits, surveys, field trips, and phone interviews Identified pain points to fix Delivered early blueprint for new site, a rough IA, basic content types, and suggested functionality
Crocstar Media Ltd	<ul style="list-style-type: none"> Developed training courses Worked with core team to develop a transition toolkit for editors Delivered two-day training courses for all initial editors during transition
Nuvole Web SRL	<ul style="list-style-type: none"> Developed and designed Drupal 8 site
Matthew Morek	<ul style="list-style-type: none"> Built early front end

GOVERNANCE

Ownership

WFP's Communications division owns the intranet, and the IT division provides the server infrastructure. A small "shadow" IT team inside the Communications division built the organization's external website and donations platform, and the intranet team was able to leverage this expertise to rebuild the intranet.

Communications has owned the intranet since the 2009 rebuild, but IT handled all site development and maintenance; this led to what team members refer to as a kind of "split personality." For example, the Communications division looked out for content and news at the expense of IA or overall site coherency, while IT worked with other divisions to create new site parts without worrying about content or how it all fit together. This wasn't the fault of anyone individually — it was simply a weakness in the old governance model.

The redesign team tried to address this shortcoming by bringing design, tech, content, and training together under one team. The goal was for everyone to make intranet design decisions (and lead the minutiae of their development) in a way that was informed by user research and a closer knowledge of the site's actual content. Having that "full stack" understanding meant that team members ended up spending considerably more time thinking about how content types interact, what forms to show editors, and how to structure the back end than anyone anticipated at the start.

Governance Challenges

One area that has presented governance challenges is the funding structure. A division such as IT, which is regularly spinning up dozens of projects and doing tons

of technical work with other parts of the organization, often has a mature funding approach that works in a variety of ways. It thus has more experience splitting costs. The Communications division didn't have the same kind of structure in place to create a clear path forward for long-term funding. It also lacked some of the data necessary to tell its own management how much the future long-term maintenance and development costs would be with any sense of certainty.

INTRANET TEAM RESPONSIBILITIES	
Role	Responsibilities
Core WFPgo team	<ul style="list-style-type: none"> • Build and maintain site • Deliver "Publishing to WFPgo" CMS training • Build and improve training • Manage stakeholders across the organization
Communications Content Team	<ul style="list-style-type: none"> • Spot check for content quality • Deliver training on writing for the intranet • Nurture the editor community • Promote stories and announcements on the front page
Intranet Council	<ul style="list-style-type: none"> • Endorse the project's overall goals and direction • Evaluate and recommend issues raised by the rest of the organization
Intranet & KM Working Group	<ul style="list-style-type: none"> • Decide how various intranets fit together • Coordinate roadmaps and shared issues
Managers of Content Owners	<ul style="list-style-type: none"> • Approve and commission content created by each topic and unit
Content Owners	<ul style="list-style-type: none"> • Create content for their topic and unit • Promote content on their topic page • Collaborate with other topic owners on joint content

URL AND ACCESS

ACCESS INFORMATION	
Item	Status
URL	http://newgo.wfp.org
Default Status	<ul style="list-style-type: none">The intranet is set as most user's default site, but some local IT policies might change thisUsers can change the default if they want
Remote Access	<ul style="list-style-type: none">Users can access the site through HTTP tunneling or VPN

TIMELINE

PROJECT MILESTONES	
Milestone Date	Milestone Description
Early 2009	<ul style="list-style-type: none">Launch of a redesigned WFPgo, the "global office" corporate intranet
Q2 2014	<ul style="list-style-type: none">Decision made to reboot corporate intranet; early audits/research
Q4 2014	<ul style="list-style-type: none">Formation of intranet council; formal approval and funding granted
Q1 2015	<ul style="list-style-type: none">Project and user research begins
May 2016	<ul style="list-style-type: none">Beta version of new WFPgo online
November 2016	<ul style="list-style-type: none">Old WFPgo redirected to new site
Overall redesign timeframe: Mid-2014 to November 2016	

CONTENT AND CONTENT CONTRIBUTORS

Accommodating Diverse Content Managers

The intranet is focused mostly on global corporate information (for now), so most of the editors are located at the organization's HQ in Rome. This set-up is an advantage, because it allows for a small team that can train larger groups of people all at once. But it's also a disadvantage in that HQ produces a lot of guidance, a lot of documentation, and a lot of *words* — and the default expectation is that all of this will go online forever.

If a division hires an editor with considerable intranet or knowledge management experience, this problem tends to decrease. However, WFP is a voluntarily funded organization working across the globe, so not every division is lucky enough or able

to focus so heavily on internal content and information. As a result, the organization has a community of editors with diverse backgrounds.

Training Editors Using a Transition Toolkit

In the past, deciding who became an editor was somewhat ad-hoc. With the transition to the new platform, the team decided early on to embrace everyone — regardless of title or background — as long as their division or chief nominated them as a WFPgo editor.

This meant the intranet team had to bring people from many experience levels through many workshops and a full two-day training program before they started working on the site. To help with that effort, the intranet team added a third member in the role of transition manager. He came on in April 2016, about two months before the beta site went live. The team also brought in Crocstar, a training and writing consultancy firm that worked extensively with the Government Digital Service team on GOV.UK.

Together, these two resources helped build the “transition toolkit” to bring editors through the process of doing user research, writing user stories, and planning out their content based on the results of that process. The team split the training into two days, with one day focused on using the new CMS and understanding the content types, and the other focused on how to write for the intranet.

The training for new editors is the same: two mandatory days.

A Cost-Recovery Training Approach

One unusual thing the WFP team has done is what it calls “cost recovery” training. It brought new editors through the initial training for free using the corporate funding for the rebuild. Then, because the team was unsure as to how many editors it would be dealing with long-term, it decided to create a structure where the various business units paid a small amount of money back to the intranet team. This will let it scale-up the team if support needs get too high, while still continuing to fund the site’s development. A side benefit of this approach — at least so far — is that it has reduced the number of requests to just throw up a bunch of pages on the site. The team has insisted that editing intranet pages is a serious job worthy of intense training and a lot of work; by asking for money to change hands (albeit, only within the organization) editors are that much more prepared. It also keeps everyone focused on providing high-level support to all editors.

Starting from Scratch

In addition to changing the intranet’s technology and look and feel, the rebuild project has thoroughly changed the way editors approach, produce, and present their content. The team did not migrate any pages from the old site. The new site was an empty container when it was set up, and the intranet team asked editors to go through a process dense in UX techniques when creating a new page. This involved the following:

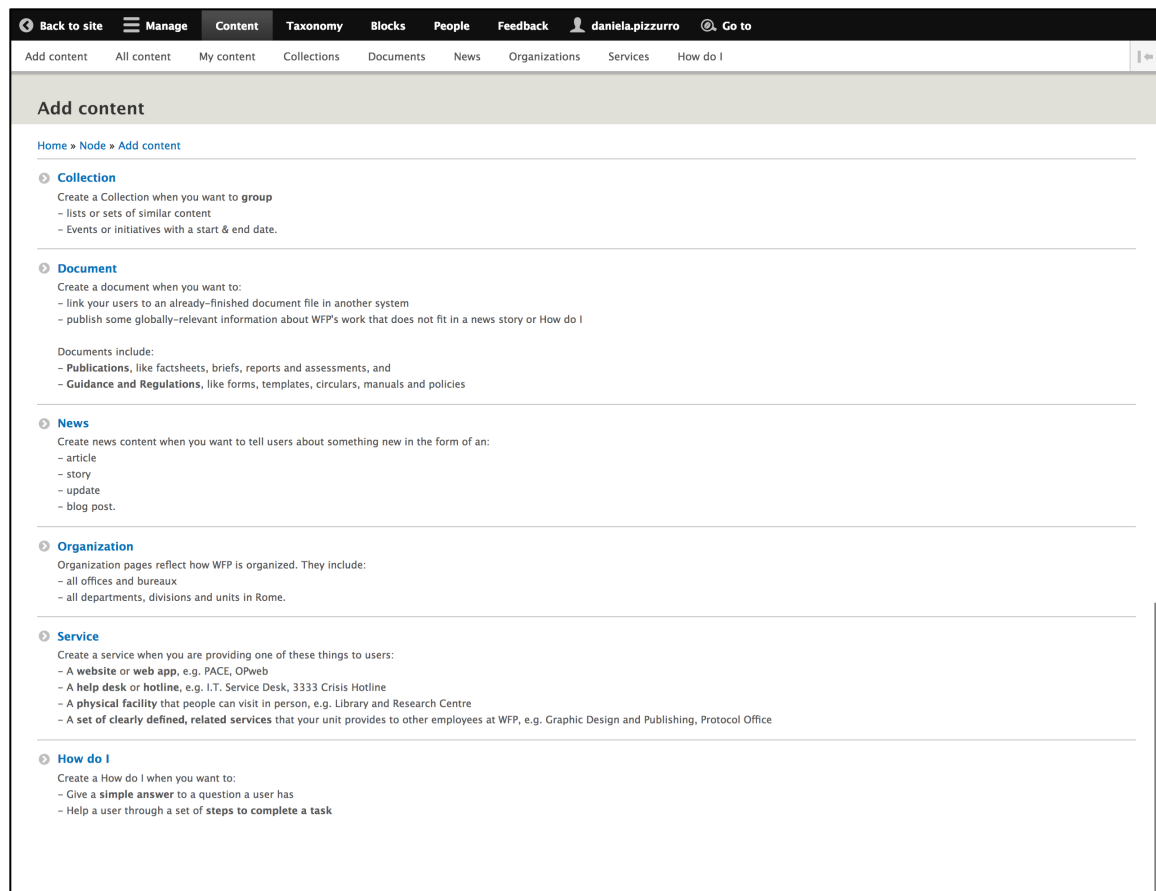
- **Transition calendar.** The team planned a transition calendar and distributed all involved groups in 10 phases.

- **User research phases.** Each phase consisted of 2-3 weeks dedicated to user research and one week to define their audiences and the tasks they perform on the site.
- **Two-day training.** With the research data in hand, editors attended the two-day training (led by Crocstar) and learned how to turn their tasks and audiences into user stories. For each user story, editors compiled a list of user requirements that had to be fulfilled for the intranet content to meet the user need expressed by the user story. Then, the team sent the groups of editors a spreadsheet to record their user stories and user requirements, and assign priority to each item as follows:
 - **High:** user stories that *must* be available on the new WFPgo in the first release.
 - **Medium:** user stories that *should* be available on the new WFPgo in the first release.
 - **Low:** user stories that must be on the new WFPgo, but can wait till a later release.
 - **Nice to have:** user stories that would be helpful but are not essential.

Once the groups had this template ready, they were given another template to structure their web content using the WFPgo content types, with the help of mind maps and content summaries.

This is how the team approached and prioritized the content, whether it existed already on the old site or not.

The redesign was also an opportunity to audit all the old site's content and get rid of the oldest and most unhelpful information. Although the team did not track the percentage of reduction from one site to the other, it tried (and is still trying) to ensure that content posted on the new site always meets a user need.



Pictured: WFP Intranet Content Types Guidelines. This page serves as a guideline for editors when they want to add new content. It reminds them which content types are available and the use cases for each type.

WFPgo Editor Guidelines

The following list of steps summarizes a WFPgo editor's role and is available as a *How Do I* page on the new site:

If you are a WFPgo editor and need some guidance creating content, here are some steps to follow:

- 1. Before adding any new content to WFPgo, you must be able to demonstrate that there is a clear user need for it.**
 - *If there is no user need and it's just content you want to push out to people to raise the profile, then we have other channels for it (this links to a page with a list of internal/external WFP channels to put content).*
 - *Before publishing, you should have some data as evidence that people need your content. Here are some research methods you can use to gather data (this links to guidelines on how to use Google Analytics, FAQs, surveys, and interviews).*

2. After you have the data, you should write some user stories for your content. This is a technique we use for creating content based on user needs.
3. You can structure each user story into a piece of content using our user story template. You can see some guidance on which content types to choose [here](#).
4. Familiarize yourself with some of the rules and guidelines for writing content on WFPgo that we have been posting to WFP Communities (and follow the intranet editors community while you are there).
5. Ensure that your content is accessible to users with disabilities and on low-bandwidth connections by following our [accessibility guidelines](#).

Obviously, with more than 100 editors, the organization had some editors who embraced this process and produced really good content, and others that either were resistant to accept the new process or did not write great content. The intranet team knew it wouldn't be easy to walk all the groups through this new process, but it also underestimated the amount of time and effort it would require. Having an experienced transition manager to take on a huge amount of this work on his own, with dozens of individual workshops, rewrites, and support, was invaluable.

Content Guidelines Example

The following guidelines were written to help editors understand the rules on how to use acronyms and jargon words in titles:

*Today I'm going to talk about **acronyms and jargon in titles**. We love acronyms in WFP — by which, I mean we use rather a lot of them. But we hate acronyms in Communications, because not everyone knows what they mean.*

*And let's face it, some acronyms are just **plain silly**. In a previous a job I once had to resist pressure to call our new intranet site COLIN (after City Of London INtranet). But I digress.*

*Sometimes acronyms can be useful, and sometimes more people know what the acronym means than what its letters stand for. Our three most popular **search terms** on WFPgo are LMS, DSA and PACE (*), so we shouldn't try and get rid of them altogether, because we know people use them.*

*So **when** to use acronyms and when **not** to use them?*

We already have some [guidelines about using acronyms in documents](#) in our editorial style guide. You should always spell them out in full at their first occurrence in text.

*In this post I'm going to provide some rules about **when to use them in titles**.*

Titles are very important on the new WFPgo. We spend some time teaching how to write good ones in our training session. The new WFPgo is more text-based than the old one. You need to write good titles and short descriptions

(the strapline in larger text underneath the title) so that they **catch the eye of users** when they scan text.

*Titles appear in search listings and on topic pages. Keywords in titles also weigh more heavily in search results, so you need to make sure the important keywords that people are typing in appear in the title or short description. As we saw, people **do** type acronyms into the **search engine**, so we do need to use them, but where and when?*

The **rules** are quite simple:

How Do I's

- Acronyms or jargon words (specialized words that only a few people know) are not permitted in titles, unless:
 - You have data to demonstrate that people are searching for them.
 - You explain the acronym in the title, so that users would still understand what the title meant without the acronym (e.g. "Complete a performance review or PACE" would still be clear if you called it "Complete a performance review").
- If the acronym is commonly used within WFP and you don't use it in the title, put it in the short description to help with search results.
- If you use an acronym, spell it out in full in the short description, followed by the acronym in brackets. For example, "Cash-Based Transfers (CBT)".

Documents

- If the acronym is commonly used within WFP, it can be used within a document title, provided you have data to demonstrate that people are searching for the acronym.
- If you do use an acronym in a document title, then make sure you spell it out in full in the short description, to help users when scanning search results.
- If there is space in the short description, then describe what the acronym means, too. For example, "Purchase for Progress (P4P), the program to support smallholder farmers."

*I hope you find this useful. We will be **feeding back** to each of you individually whenever we come across any examples of acronyms and jargon words that are not being used appropriately, so if this means you, then please help us out by changing it before we do.*

TECHNOLOGY

TECHNOLOGY	
Category	Technology Used
Web Server Hardware and Operating System	<ul style="list-style-type: none">• Standard LAMP• Red Hat Linux
Bug Tracking/Quality Assurance	<ul style="list-style-type: none">• Jira• Jenkins• Gitlab CI
Design Tools	<ul style="list-style-type: none">• Balsamiq• Photoshop• Paper prototypes
Site Building Tools	<ul style="list-style-type: none">• Composer• Drupal 8
Content Management Tools	<ul style="list-style-type: none">• Drupal 8
Search	<ul style="list-style-type: none">• Apache Solr
Other Functions	<ul style="list-style-type: none">• Optimal Workshop

ROI

After an array of user research was carried out both by the internal team and the external company, team members had a better sense of which goals they ultimately wanted to reach with the redesigned intranet. They then broke down each goal into smaller ones, and defined KPIs for each that they could use to measure against. They also took an exhaustive approach to creating and measuring ways to gauge how the new intranet's various improvements were moving the dial; these measures are outlined as follows:

SHORT-TO MEDIUM-TERM GOALS

Goals		KPIs	Baseline for 2016
Ensure Employees Receive Important Corporate Communications	<ul style="list-style-type: none"> • Improve findability of information • Fix intranet tech issues, such as slow speed and broken search • Enable mobile access 	<ul style="list-style-type: none"> • Usability tests • Use of search vs. browsing (%) / search refinement • Page load time • Sessions from mobile devices 	<ul style="list-style-type: none"> • 6.25% of visits used site search • 26.5% search refinements • Average page load time 5.60 seconds • 2% visits from mobile
Foster Collaboration	<ul style="list-style-type: none"> • Reduce organizational silos • Reduce duplication 	<ul style="list-style-type: none"> • Number of coauthored topics or pieces of content 	<p>Cross topics</p> <ul style="list-style-type: none"> • 21/121 <i>How Do I</i> pages • 14/72 <i>Services</i> pages • 32/656 <i>Documents</i> • 12/50 <i>News</i> <p>Co-authored</p> <ul style="list-style-type: none"> • 12/121 <i>How Do I</i> pages • 14/72 <i>Services</i> pages • 94/656 <i>Documents</i> • 17/50 <i>News</i>
Provide Trusted, Reliable Information	<ul style="list-style-type: none"> • Make content easily readable (plain English) • Audit and update content regularly 	<ul style="list-style-type: none"> • Readability score • Date on pages and documents 	

Measuring Metrics Over Time

Six weeks after the launch, the WFPgo team measured a series of metrics on the new site and compared them with the old intranet over the same time period the previous year. They found that:

- The number of sessions on the new site increased by 35.29%
- Users increased by 3.66%
- Page views increased by 4.45%
- Search use increased by 33.92%

Five months after launch, the team collected and analyzed data again against the old site and over the previous year's time, and found the following results:

- Sessions increased by 28.85%
- Page views by 1.21%
- Search use increased by 55%

The sessions and page views were significantly higher compared to the old site right after the launch (possibly due to the communications around the launch time and employee curiosity), and then slightly decreased (or simply normalized) over the following few months.

In contrast, the use of search continued to grow over the months. The designers read this positively as an accomplishment of one of their main redesign goals (fixing the search engine), as many users can now better rely on it.

Looking at the homepage news, they noticed an increase of views that varied from 30 to 150% by comparing stories published on both platforms (old and new) on the same topic.

Readability Improvements

Readability has also improved on the new site. The team calculated and compared the readability score for three of the top tasks on the old and new sites as follows:

READABILITY IMPROVEMENTS			
Task Name	Content type	Score* old GO	Score* new GO
Sick Leave	How Do I	22	55
Building Pass	How Do I	45	69
Calculate DSA	How Do I	43	55
<i>*Based on Flesch reading ease: 100–90 very easy to read; 90–80 easy to read; 80–70 fairly easy to read; 70–60 plain English; 60–50 fairly difficult to read; 50–30 difficult to read; 30–0 very difficult to read. WFP is aiming for a score higher than 50 on the new site's How Do I pages.</i>			

Site Speed

To measure site speed, the team compared metrics on approximately 20,000 page views and found that it now takes 2.7 seconds less to load pages.

It also measured the improvements on site speed for a low bandwidth country (South Sudan) and a high bandwidth country (Italy):

Country	Metric	Old WFPgo	New WFPgo
South Sudan	Average page load time (in seconds)	7.99 sec	3.27 sec
Italy	Average page load time (in seconds)	2.66 sec	1.39 sec
In South Sudan, the page load time has been reduced by 59%; in Italy, it has been reduced by 48%. This results in actual staff time saved to perform tasks on the site.			

LESSONS LEARNED

WFP team member Jordan Cox, the Intranet Project Manager, shares some of the many lessons team members learned through the redesign effort, as well as the best practices they found along the way:

- **Governance is always tougher than you expect.** “Even if you think you’re getting it right, it’s always harder than it seems. There can be so many competing voices and priorities in an organization that it really helps to give your governing body or council some kind of formal decision-making power that gives them the power to decide something and then move on. We went with more of an ‘endorse the direction of travel’ way of governing, and it meant that there were a few times when we hit a tough issue (groups not happy with the corporate taxonomy, or the minimalist design, or various other things) and we didn’t have a clear way of coming to consensus on it. This doesn’t mean you need a really complex decision-making matrix, necessarily, but it does mean as much clarity as you can get on the types of decisions the governance group needs to definitively make.”

- **User test as much as you can and as often as possible.** “If we had a bigger team, we probably could have tested a lot more. We did a lot of research, but I definitely would have built more explicit testing days/phases into our mockups, our prototypes, and our early versions. The ROI is so much higher compared to the amount of time I spent on stakeholder management, building business cases, and other work that’s important, but there is really nothing like testing stuff in terms of insights-per-hour you get from it. As the project lead, if I were doing it again, I would force myself to run regular usability tests — as in: I’d run them personally alongside our UX Manager and others just for the value and insight it brings.”
- **Taking a strict UX approach to content development is both time- and resource-intensive.** “I underestimated how hard it would be to get dozens of editors on board with some of the UX-centric concepts we were pushing in our transition toolkit and training courses. We spent a lot of time getting them to write user stories and user requirements as a way of planning out their content, and at the very start I really underestimated both 1) how much additional pre-work this would feel like to a lot of editors, and 2) how hard it would be introducing concepts that originally came from UX — and, to some extent, from software development — into the act of writing. Unless you have someone following up and reminding editors on a regular basis that using these techniques really improves content and keeps the intranet from just becoming a dumping ground, people will start to ignore them and just put stuff up.”
- **Editors’ skill level will vary widely, so plan for that reality.** “We agreed to train anybody, and I wouldn’t change that, but there is still a big gap between a digitally savvy web editor who has worked on big websites before and someone who has just been asked at random to ‘update some stuff on the intranet’ alongside six other jobs, and it’s tough to bridge that gap, even with a great training program and ample support.”
- **Just because you build it doesn’t mean they will come.** “A responsive, mobile-friendly site is not going to see a lot of mobile usage without some effort. We went all the way into 2016 without a mobile-friendly intranet, and we’re still behind the firewall when staff are out of the office, which means more steps to access the site, so the mobile usage numbers are not up where we thought they would be when we started the project, and still represent a tiny number of our overall users. I expected mobile usage would just jump up automatically as soon as we told people: ‘We have a mobile friendly intranet,’ but I was wrong on that.”
- **Decommissioning old sites always takes a lot longer than you think.** “The idea that you’ll be able to wrap up the old domain and switch the new intranet over to it in 6–12 months? Not so realistic. If I had known this in advance, I wouldn’t have gone with ‘newgo’ for the URL, because it’s been over a year since our beta went online, so it’s not really that new anymore, and will be more of a pain to redirect down the road now that we have thousands of newgo.wfp.org pages.”

- **Having a single taxonomy structure across the organization has its advantages.** “We used the corporate taxonomy as our information architecture, which helped us in a lot of ways, including better governance. We could point to other systems using it, which makes it harder to interfere with; better links; and integrations down the road. At the same time, a taxonomy designed to work on multiple systems is going to have certain terms that aren’t really perfect for an intranet. But I don’t think we would have decided differently. Having multiple taxonomies is just a drag.”
- **Take a deep dive into the content very early in the project.** “I would recommend getting your hands dirty with the content on your current intranet as soon as humanly possible in the project and thinking of it from both the IA and content type perspective. This was surprisingly difficult, because the pages on our old intranet were a mix of things, there were no real ‘content types,’ everything was kind of multifunctioning and doing its own thing. If I had listened better to advice and really started auditing and looking at some of the existing content on the current intranet in a deeper way earlier on in the project, I think we would have realized we needed some content types far earlier (such as *Collections* to bundle up existing pages) than we did, and some of the thinking on how the various content types relate to each other at the CMS level would have been done earlier. As it was, we were well into our early prototype before we had fully figured out how the *How Do I* pages would be supported by the other ones, or exactly what was needed on a collection page.”
- **Tackle the integration specifications early.** “We found that not planning out and doing the specs on the various ways your intranet will integrate with other systems means that these integrations keep getting pushed down the road because other stuff becomes more important. And, as you keep growing and building the site, doing something big like a deep integration with another system becomes harder, as you have more complexity to your site by this point. It’s good to prioritize the really important integrations and spec them out as early as you can.”

Best Practices

- **Bring in a transition expert.** “Bringing on someone experienced to help with the transition and really dedicating time to editors was a huge benefit. Mark’s experience in doing big site transitions in the past made a huge difference to the project when we had trouble getting our heads around the scope of what we were trying to do with such a small team.”
- **Find champions.** “The combination of extensive user research and an intranet council that endorsed our principles really made a big difference in stakeholder management. It helped us make some bold choices that people could get behind.”

- **Trainers must be UX focused.** “Bringing in trainers who are on the cutting edge of user-focused content, especially public service content, really gave us some perspective on what we were trying to do that helped immensely. The GOV.UK project was huge, far bigger than ours, but the team doing it was proportionally not that big. So having advice from Crocstar, which had worked so closely with a lot of the members of the team doing that transition, was just hugely helpful in helping us bring our 100+ editors over to the new system.”

United Nations (UN) (2020)

OVERVIEW

COMPANY

The United Nations (UN) is an international organization founded in 1945. It is currently made up of 193 Member States and two Observer States. Due to the powers vested in its Charter and its unique international character, the UN takes action on the issues confronting humanity in the 21st century across four main pillars: Peace and Security, Sustainable Development, Human Rights and Humanitarian Assistance.

The Secretariat staff, made up of international civil servants and locally recruited staff, support the UN's work for peace and help the organization deliver on its commitment to people around the world. The UN provides a forum for countries to come together to tackle the most challenging issues of our time.

Headquarters: New York, US

Locations: The UN has offices all over the world; its 8 main offices are in New York, Geneva, Nairobi, Addis Ababa, Vienna, Beirut, and Santiago. It also has 5 regional commissions, 14 political missions, 14 peacekeeping missions, and many other regional and country offices.

Locations where people use the intranet: iSeek is accessible without login to staff at all UN office locations, and through mobile devices anywhere in the world via password protected access.

As of July 2019, 90% of UN Secretariat staff use iSeek as their only intranet. In 2015, that number was only 22%.

Annual revenue: The UN is a nonprofit organization. It is financed by assessed and voluntary contributions from its Member States.

THE INTRANET

Users: All UN employees (approximately 37,500) use iSeek for internal communications and knowledge sharing. The platform helps staff located at duty stations and field missions all over the world keep up to date with new policies, find the information they need to do their work, and connect with colleagues.

Mobile approach: Responsive web design

Technology platform: Drupal 7

LEADERSHIP TEAM

The UN Intranet-iSeek (designated as "iSeek" in the rest of this document) operates under the supervision of an editorial board composed of representatives from several departments in the UN, under the leadership of its Chairman, Maher Nasser, Director of the Outreach Division in the Department of Global Communications. It is led by the Manager of the Knowledge Solutions and Design Section, Helga Leifsdóttir, and by the iSeek Team.

CORE TEAM

Helga Leifsdóttir, Knowledge Solutions and Design Section Manager; David Mimran, iSeek Team Leader;

Team members: Frédéric Fath, Annie Paprocki, Renée Luque, Stéphanie Spiegel; Sara Hohn, Consultant; Eric Hahn, Web Team (Development) Team Leader

SENIOR LEADERSHIP

Department of Global Communications / Outreach Division: Maher Nasser, Director and Chairman of the intranet editorial board; Maha El-Bahrawi, Deputy Director; Ramu Damodaran, Deputy Director

WIDER TEAM AND IT SUPPORT

Web Team: Catherine Pysden, Debra Ramsthaler, Sat Byell-Lee

Graphic Design: Ziad Al-Kadri, Team Leader;
Team Members: Martin Samaan, John Gillespie

Office of Information and Communications Technology: Sirhan Chaudry

INTRANET TEAM



Team members shown here (left to right): Stéphanie Spiegel, David Mimran, Fred Fath, Renée Luque, Helga Leifsdóttir, Annie Paprocki, and Eric Hahn.

HIGHLIGHTS ABOUT THIS WINNER

The UN Intranet-iSeek (i-Seek) is the primary internal communications and knowledge-sharing tool for the United Nations' global workforce. Accessible to 37,500 users across all UN office locations and through mobile access everywhere in the world, iSeek helps staff members in all duty stations and field missions keep up to date with new policies, find the information they need to do their work, and connect with colleagues.

A combination of global and localized content—accompanied by authentic imagery and video—bring people together while also providing a window into the people-first aspects of this distributed organization. With some users working in harsh or extreme environments, iSeek unifies staff under a shared mission. Like a standard intranet, iSeek brings tools and systems to employees' fingertips, but its human-centered approach to content and features provide staff with a greater sense of meaning and belonging. Those features include:

- **Emergency response:** When Haiti was hit with a 7.0 magnitude earthquake on January 12, 2010, the UN lost more than 100 staff members in a single moment. Editors from many offices utilized iSeek as an emergency hub and to honor staff members whose lives were lost while serving in a peacekeeping mission. iSeek's homepage design was changed from blue to black and grey, and the team dedicated an important part of its editorial efforts to drafting obituaries, which were posted daily on the intranet for more than a month. This brought people together and reminded staff of the role that iSeek plays in providing a support system in the face of tragedy.

- **Expansive footer toolkit:** *The Toolkit* is the name for iSeek's stunning footer that appears on every page. It surfaces popular and frequently used links, which could otherwise be difficult to find in such a large site. It is tailored for each duty station and, because essential tools can vary considerably among duty stations and missions, iSeek works with Focal Points to select the right mix of tools and content to meet the unique needs of different user groups, while maintaining a core set of global links.
- **Integrated job search:** A powerful search connects job seekers around the world with the right UN opportunities. Having a robust global jobs section facilitates career development for employees, while also supporting the organization's core mission to serve countries and people around the world.
- **Purpose-driven app catalog:** Modernization is essential for the UN to carry out its mission and mandates, and enterprise systems are integral to those efforts. The global app catalog offers a quick, single-page view of all of the applications developed by the IT department. It provides links to launch the apps, helpful resources, and support.
- **Self-serve business card app:** An integrated app helps users create and customize their UN business cards from a standard template. Staff can choose from one of four beautiful back-of-card designs; the app then generates a dual-sided, print-ready PDF. Employees can print the cards themselves or take them to a print shop to complete production.
- **Worldwide classifieds:** The UN has a mobile workforce and staff members move frequently from duty station to duty station over the course of their careers. The intranet can help staff quickly sell their furniture in one location and rent an apartment in another duty station, all using the iSeek classifieds.

BACKGROUND

Uniting the United Nations

iSeek is the official internal communication and knowledge-sharing platform for UN staff. Like the wider UN, one of iSeek's goals is to bring diverse groups of staff members together.

Sometimes that can be challenging.

The UN comprises more than 37,500 employees dispersed across eight major duty stations and dozens of field offices. They deal with a wide array of issues, from socioeconomic research and human rights to international law and conflict resolution. Convincing people in these diverse roles that one unified platform could address all of their specific needs was not always easy.

iSeek was founded in 2005 at the direction of the Deputy Secretary-General, the UN's second-in-command. The project was housed within the Department of Public Information (DPI) (now the Department of Global Communications)—one of the nine main UN departments—with technical support and development under the purview of the IT department. As a top-level project, buy-in was guaranteed. So initially, persuasion wasn't necessary.

Fast forward to 2007, and iSeek was in crisis. A change in the UN's senior leadership meant that the project lost its buy-in and the small iSeek team was left with little authority to govern the internal communications systems created by other departments. The first to jump ship was the Department of Peacekeeping Operations, one of the largest UN departments. With vast field operations, Peacekeeping could not count on iSeek as a reliable tool to connect with its staff in locations where establishing a LAN connection was not possible. Moreover, iSeek's cumbersome CMS meant that loading an article could take up to 45 minutes—an efficiency cost that was simply too great to bear. Peacekeeping therefore chose to set up its own intranet on SharePoint.

Peacekeeping's breakaway compounded iSeek's challenges and the organization's overall efforts to unite its global workforce. Not only did iSeek lose a major contingent, it also lost its operating budget. And, because it could no longer rely on the financial contribution from Peacekeeping, iSeek was left with a (nonsalary) operating budget of only \$5,000. With next to no funds, iSeek had limited ability to update its aging platform. Then, other departments began to follow Peacekeeping's lead and opt out of the platform.

The period between 2007 and 2015 was marked by an uphill battle to obtain a modern platform and the effort to persuade departments to move back to iSeek. Overcoming these obstacles required a long-term vision and strategy. It meant leveraging whatever resources could be found in-house and marketing iSeek as a valuable technological proposition. The team's approach was to try to engage allies first and skeptics later, and only then to persuade management.

Team members had to do many things to bring iSeek back, but their first task was to find a platform.

The Search for an Efficient Platform

The impetus that led many departments to abandon iSeek was the platform's limited technological capability. So, the first step toward unification was to upgrade the platform. The team considered adopting WordPress as a quick, short-term solution, but WordPress was not a UN-sanctioned software at that time so the IT department would not be able to support it. The iSeek team understood that going it alone would not be a sustainable solution. In 2011, the UN finally adopted new IT standards and iSeek began its conversion to a Drupal-based CMS system with the ability to address the needs of its clients. Landing on Drupal was a huge step. But iSeek also needed a makeover.

Reinventing iSeek from the Outside In

In 2015, a redesigned iSeek debuted. It had a dramatically different look and feel on a modern, responsive platform, and it came with a slew of new features and dynamic content, including: *Toolkit*, an extensive footer with links to important tools and information; *In the Spotlight*, a space on the homepage to advertise campaigns; a widget for the UN Twitter account; and a new events calendar. Contributors and editors were enthusiastic and appreciated that it was easier to add and manage content.

Concurrent with the redesign, the team also transformed its editorial policy to keep up with the era of short attention spans. The new policy reduced the length of articles to 350 words and gave contributors greater editorial authority. The goal was

to help them improve the content and avoid UN jargon. This required constant effort, but the payoff was worth it as readership increased. New features, such as likes and comments, encouraged staff engagement. And later, in response to staff feedback, announcements and events were featured more prominently. These changes occurred in parallel with the technological improvements, which meant iSeek wasn't just shiny and new on the outside; it was fully refurbished and open for business.

If You Build It, Will They Come? Maybe Not

The team hoped that the new design combined with modern features and useful tools would entice breakaway departments to return to the fold, but it just wasn't that easy. It took a lot of convincing and adapting to the needs of clients to make the reintegration happen. And some of the obstacles were ones it never expected.

One challenge the team encountered was with perception. Across the organization, iSeek was thought of as a "New York product." As such, departments thought it would be dominated by Headquarters' interests and thus would fail to fully consider their unique needs. Overcoming this misperception required an internal marketing campaign. The intranet was rebranded, from "iSeek" to "The UN Intranet-iSeek," to reinforce the idea that it was the official platform of the entire organization. The team also abandoned its distinct logo and adopted the UN emblem instead, in an effort to communicate its motto: "One intranet for ONE UN worldwide."

The lesson learned: marketing matters, even for an internal project.

Working Toward Unification

Armed with a modern, redesigned platform, the iSeek team could now tackle a longstanding challenge: how to convince departments that had abandoned iSeek for their own intranets to come back. To bolster the case, the team used global survey data to show that staff members in these departments were very interested in gaining access to iSeek.

The team then worked to gain allies, one department at a time, starting with those most ready to join; it left the highest peaks to tackle later, once it had accumulated some buy-in.

Convincing the Department of Political Affairs, with its many field missions, to integrate into iSeek in 2018 was a milestone. This process involved a thorough analysis of the department's existing intranets and extensive consultations with the communications and IT professionals working in remote locations. The iSeek team then took their requirements (security alerts, social media widgets, customized homepages, etc.) and created a dozen "mission" templates. It then presented the templates to mission staff members, who selected their favorite.

This victory provided a proof of concept, which opened the doors for many other field offices to follow suit. From there, the team was able to persuade Peacekeeping—the first defector—to rejoin in 2019.

A Flexible, Global Platform

With all that going for the team, the only thing left to reach the final frontier of universal adoption was to bring the unconvinced on board. The team stood firm that these groups would need to adopt the iSeek template look and feel, but offered flexibility in the content types that they could serve. That's where the Drupal CMS

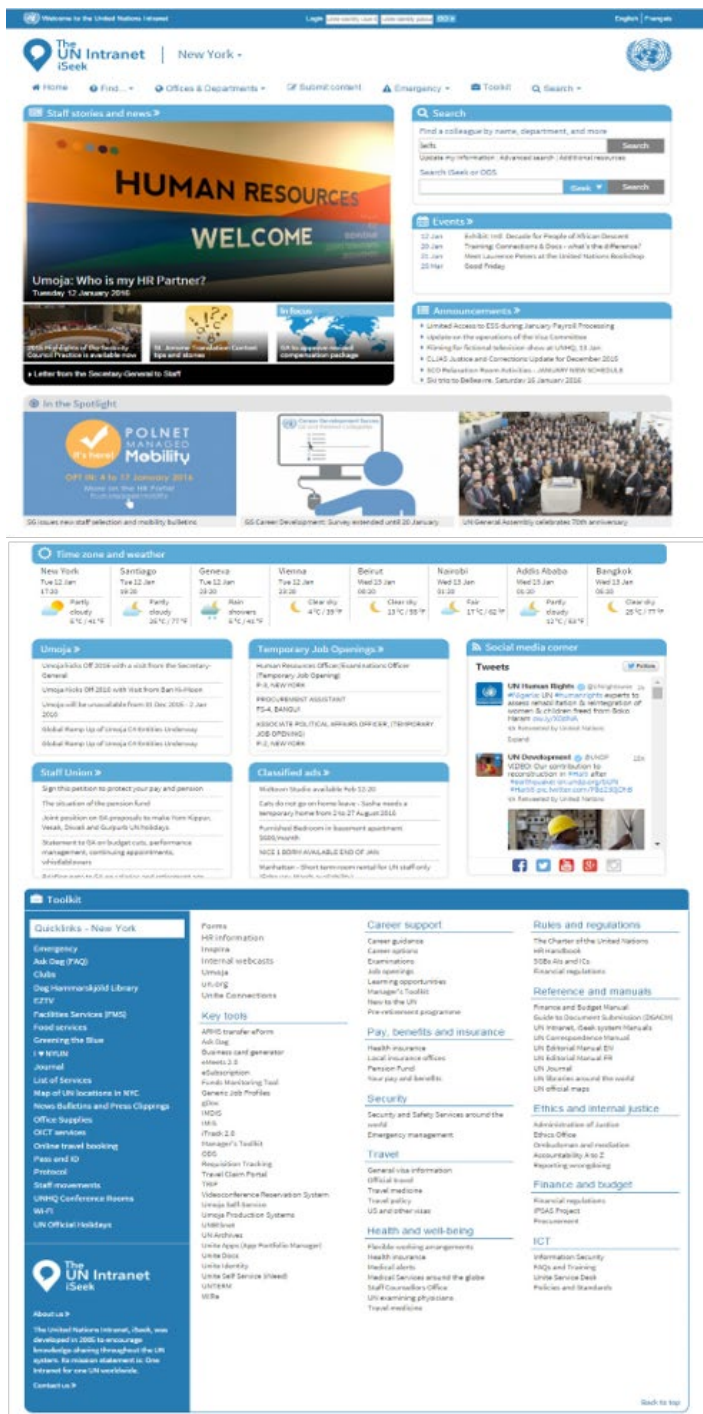
proved to be pivotal. It enabled the platform to provide a new mix of content, relevant to all staff, everywhere, letting global content stand alongside content that would be of local interest only. This meant that stories, features, announcements, events, and many navigational elements could be customized by location.

To support that model, the small iSeek team—six people based at headquarters—manages a global network of content managers called *Focal Points*. The Focal Points are authorized to manage the site needs for their offices, and the iSeek team supports them by offering training and making sure their content is up to date and adheres to guidelines.

Also pivotal was the iterative approach the team adopted to unify the intranet—rolling out technical and design changes on a monthly basis, rather than waiting for one big redesign. This “launch first, refine later” approach allows iSeek to be improved constantly, and will hopefully prevent it from falling back into the trap it found itself in 2007 when offices began abandoning the platform.

The team periodically collects user feedback, through global surveys and focus groups, usability tests, and interviews. It also uses analytics generated by the CMS and Google Analytics to track user behavior. This data helps the team assess the effectiveness of various content types and internal communication campaigns.

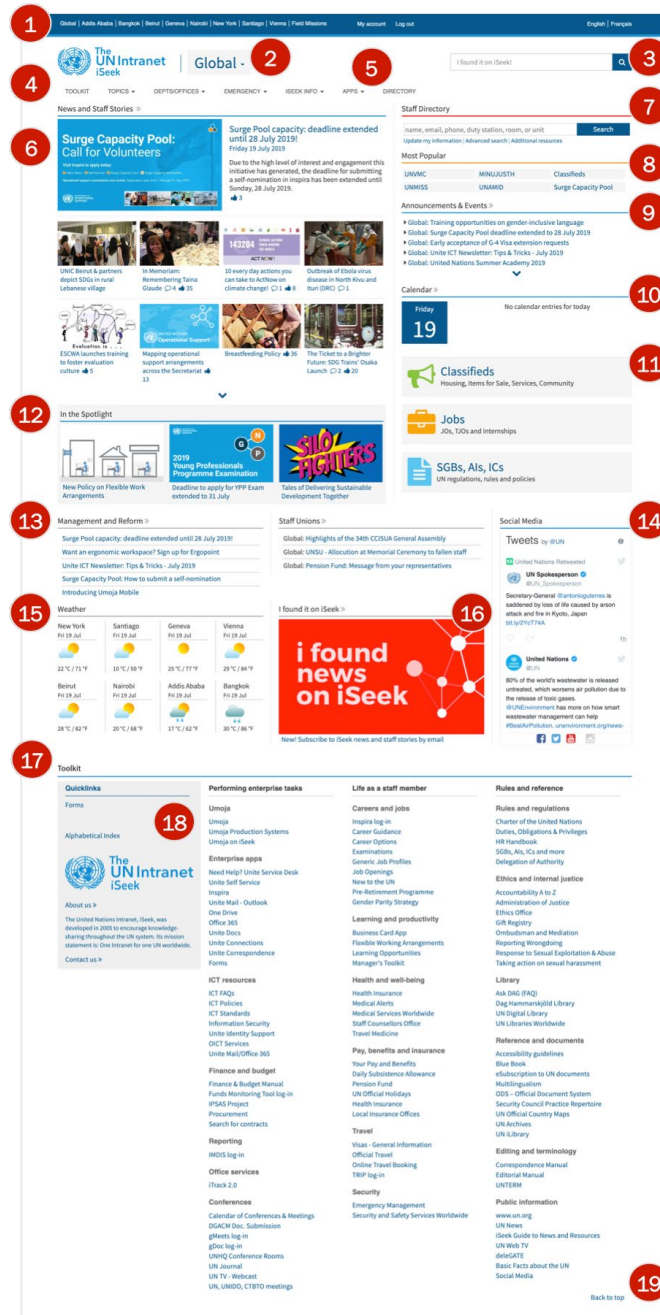
This long, slow march toward intranet reunification was difficult, but worth the effort. The reintegration of iSeek across the UN has reduced fragmentation and saved money. Worldwide staff members are getting the same messages, so they feel more connected and more united in their purpose. And that benefits everyone.



Pictured: This shows the UN intranet homepage as it was in 2015.

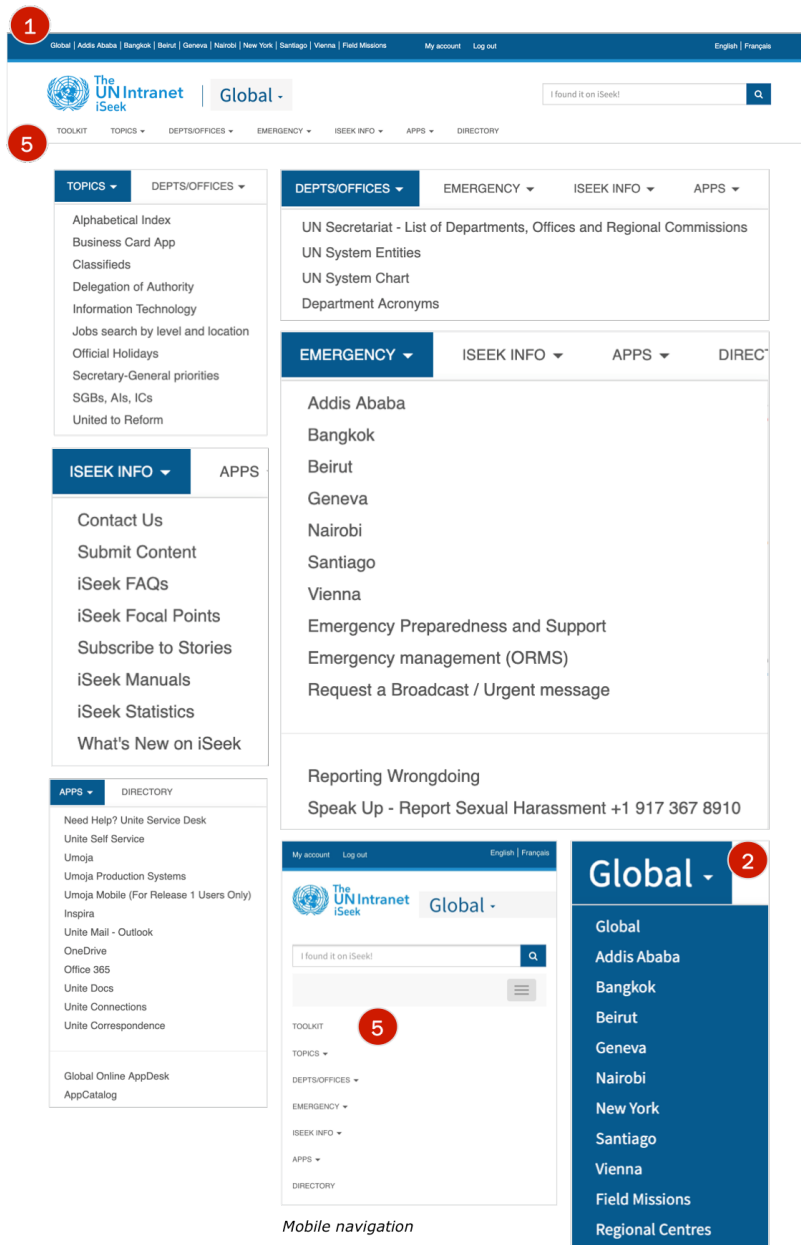
DESIGN REVIEW

Homepage and Navigation



Pictured: iSeek's homepage balances global and local content with the aim of making all staff members feel at home regardless of their work location.

Homepage and Navigation



Pictured: iSeek's drop-down menus, duty station menu, and mobile navigation are fully responsive so users can find exactly what they need on any channel.

Homepage and Navigation Highlights

With its modern fonts, breathable spacing, and clearly defined content slots, iSeek's homepage caters to on-the-go staff, as well as people working at the UN's duty stations. Available in either a global or duty-station specific view, the homepage displays critical news and announcements, provides quick access to frequently used tools, and offers a window to external content via a social media widget.

1. **Utility navigation:** The links in iSeek’s utility navigation are available on every page and allow users to quickly access the global intranet and bespoke versions for each of the UN’s eight duty stations around the world. Employees can also access their account information, log in, and easily toggle their language preference between English and French (the two languages iSeek supports).
2. **Global drop-down:** The *Global* view of the iSeek homepage contains information relevant for all UN staff, regardless of their location. Employees can also select a specific duty station from the global drop-down menu with options for: Addis Ababa, Bangkok, Beirut, Geneva, Nairobi, New York, Santiago, Vienna, Field Missions, and Regional Centers. Upon selecting a duty station, the homepage seamlessly displays relevant content localized to the selected duty station.
3. **Search bar:** A prominent search bar in a familiar location connects users to key pages and policies they need. iSeek’s search is kept relevant and tidy through diligent efforts to preserve the metadata of the content presented, and older content is often unpublished in an effort to continually improve search over time. Results can be refined by duty station, level, and so on. iSeek uses Solr search, which is the approved UN standard search technology.
4. **Toolkit anchor link:** The first link in the main navigation is *Toolkit*, an anchor link that gracefully jumps users down to the highly functional and rightfully named footer.
5. **Main navigation:** To determine which links to place in the main navigation, the iSeek team relied on analytics data and usage trends to understand which site areas employees visit most often. Links to topics, departments and offices, emergency information, iSeek info, workplace apps, and the staff directory won these coveted spots for the *Global* view. However, for localized versions of iSeek, the main navigation is tailored to users’ specific needs in each respective duty station.
6. **News and staff stories:** The noticeable placement of news above the fold, the attention-grabbing photography and clear headlines, and the counts and iconography for comments and likes make this news widget quite wonderful.
7. **Staff directory:** Here, staff can find colleagues’ contact information (email, phone number, office) by searching for names, locations, or departments.
8. **Most popular:** Links to the most-viewed pages live here, updated daily based on analytics. A subtle grey background appears behind each link to create the visual separation needed for users to easily distinguish between links.
9. **Announcements and events:** Placed prominently on the homepage, this top iSeek feature showcases UN happenings,

holidays, and UN days so staff can stay informed in advance about what's going on at the organization. Events and announcements are also tailored to each duty station and can be managed by Focal Points or empowered staff members with the proper credentials to post events and announcements on behalf of their offices.

10.Calendar: The homepage's calendar widget provides a helpful reminder of the date and the events that are scheduled for that day. It also links to the powerful monthly view.

11.Classifieds, jobs, policies: User can access three of the most popular iSeek content areas—classifieds, jobs, and policy information—directly from the homepage. The large, blue text link placed on a subtle grey background helps distinguish these helpful features while colorful-yet-informative iconography visually reinforces their meaning.

12.In the Spotlight: Whether related to work policies affecting employees, time-sensitive content, or information that ladders up to the Secretary-General's priorities, the *In the Spotlight* area of the homepage sheds light on featured content that is of primary importance to generate staff awareness.

13.Management and staff content: iSeek provides a platform not only for management to talk to staff, but also for staff to respond via comments and likes. Individuals can ask questions and expect a response. Conversations are sparked between staff and management that otherwise may not have a place to begin. The intranet is viewed as an essential tool, and management actively promotes iSeek use throughout the organization.

14.Social media: Born from a survey that indicated staff wanted access to employee-only information—as well as public-facing content—from within iSeek, the social media widget helps demonstrate how internal communication supports the work that is visible from the outside. Users can thus see the wide variety of themes featured on the UN's Twitter account.

15.Weather: A weather widget is displayed on the homepage because UN staff members are present in so many places around the world. The aim of this feature, however, was less to offer the weather forecast for each duty station than to act as a world clock in different time zones—fueling the perception that staff are working “around the clock, all around the world.” At the same, it does display the time and temperature—in Fahrenheit and Celsius—to help staff better plan their trips.

16.I found it on iSeek: From this linked space on the homepage, users can access a unique communications campaign that strives to raise ongoing awareness about iSeek's global usage statistics and improvements, through a retrospective look back over time. Dating all the way back to 2011, credibility-boosting infographics help employees to see just how far iSeek has come

in terms of stories posted, comments received, number of sessions, page views, and more.

- 17. Toolkit:** The footer *Toolkit* provides easy access to myriad popular and frequently used items, including HR information, salary and benefits, rules and regulations, and travel resources. The *Toolkit* also includes links to major enterprise applications and select digital productivity tools, organized by themes, personalized for each duty station, and available on every page. Some links point to content or tools available on iSeek (such as IT information and UN holidays), while others link to external sources, such as the Dag Hammarskjöld Library, which is a public website.
- 18. Quicklinks:** As its title suggests, *Quicklinks* offers users fast access to forms, an alphabetical index of pages, a link to *About* content, iSeek's mission statement, and a link to easily get in contact with the team.
- 19. Back to top:** As the *Toolkit* anchor link in the main navigation gracefully scrolls users down, the *Back to top* link smoothly scrolls them right back up.

News Story

[illegible]

Pictured: News stories on iSeek include prominent, easy-to-grasp headlines, undistracting imagery, proper techniques for length and formatting, and social capabilities, such as likes and comments.

News Story Highlights

News stories originate from employees and Focal Points across the organization. This enables iSeek to deliver fresh and interesting daily content that employees truly care about. The team publishes three to five stories per day, which represents over 900 stories per year.

For example, UN staff felt passionately about the issue of plastic pollution and its devastating impact on the environment, particularly when it ends up in oceans. Wanting to free the UN Headquarters from single-use plastics such as plastic bags, straws, and cutlery, staff members began writing opinion pieces on iSeek that advocated for their removal. Other employees chimed in with comments and likes, expressing hope that the organization might eliminate all single-use plastics from campus. Through the power of these news stories and employee engagement, single-use plastic consumption ended at UN Headquarters in 2019.

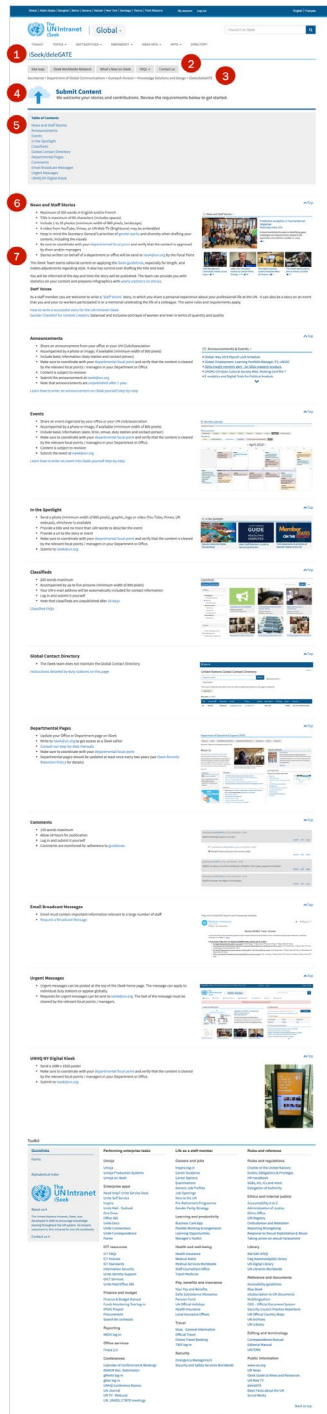
In another example, Chloe, the cute and friendly English Bulldog that serves as the UN therapy dog in New York, started a conversation about stress in the workplace and became a mascot. All of the news stories involving Chloe shot up to the top of readership. People at the UN clearly like animals, as staff worldwide requested therapy cats, goats, bunnies, and monkeys in response.

- 1. Clear display of story attributes:** Users aren't left guessing whether a piece of news is recent or stale, as each story leads with its full publication date displayed in international format. Readers can also immediately see the duty station, office, and author of the story.
- 2. Noticeable-yet-informative headlines:** The main headline is prominent and eye-catching, but also clues the reader in to what exactly the story is about.
- 3. Static hero image:** Like a perfectly fitting puzzle piece in iSeek's page layout, the main image that coincides with the news takes up enough space to effectively communicate, but not so much that it needlessly decorates the page. Because images are static (rather than contained in a rotating marquee), there's no risk of distraction and readers can focus on getting the information in the text content they seek. This also complies with web accessibility guidelines.
- 4. Image gallery:** For stories with multiple images, users can click through a gallery of complementary photos to help visually reinforce the key messages contained in the news.
- 5. Article summary and length:** UN employees are busy with the important work of bringing countries together to solve some of the most critical and pressing issues of our time. As such, they don't have a lot of time to devote to reading iSeek news. The inclusion of an italicized summary and a concise-yet-comprehensive writing style allow staff to quickly scan the content, grasp the core points, and stay informed efficiently.
- 6. Right rail:** As users scroll down the page, they see commands such as *Like*, *Email*, and *Print*, along with relevancy facets in the form of tags, topics, and audience groups. The office, duty station, and author responsible for publishing the story are also reinforced in the right rail

for easy reference. Each link takes users to more news stories that contain the same attributes.

- 7. Content formatting:** Formatting techniques such as using chunking, white space, bold keywords and phrases, bullets, blue link text, and clear subheads all lend favorably to the scanning behaviors that users demonstrate when reading online.
- 8. Comments and likes:** A critical way of facilitating more two-way communication between employees is the incorporation of social features on iSeek's news articles, events, and announcements. The quantity of likes displays next to the familiar thumbs-up icon, and comments appear below in grey boxes. Each comment includes the employee's name, time, and date of submission, and users can reply to comments or add their own. As the transparent and contextually relevant helper copy states, comments shouldn't exceed 1,000 characters and are moderated by the iSeek team to help deter controversial or inappropriate discussions. Comments prove to be a useful way to engage readers and capture feedback about how to improve iSeek and the UN as a whole. The iSeek team tracks engagement with likes and comments, and has seen a steady increase each year. Many departments even look at the number of likes and comments on their news stories and wish there were more.

Submit Content Guidelines



Pictured: Clear guidelines for submitting content are available to staff members to ensure content meets iSeek’s quality parameters and publication standards.

Submit Content Highlights

The *Submit Content* page on iSeek takes all of the guesswork and intimidation out of the distributed content creation and contribution process. This simultaneously helps UN employees feel welcome and empowered to contribute content, while the clear limits on length, the process requirements, and the blatant for how to unpublish work to preserve the integrity and relevancy of iSeek's content.

1. **Page headline:** The blue headline is large enough to stand out and indicates exactly which page the user is currently on, helping to avoid any confusion among potential contributors.
2. **Section-specific navigation:** Contained in grey tab-like elements, the secondary navigation links to content that's directly related to posting content to iSeek, including a sitemap; the network of Focal Points, contributors, and team members; new iSeek features; frequently asked questions; and an online form to contact the iSeek team directly if questions arise.
3. **Breadcrumb:** Having the breadcrumb at the top of the page helps users understand how the site is organized and the paths they can take to find what they need. The page title exactly matches what is shown in the last position in the breadcrumb, which is favorable—and a breadcrumb best practice.
4. **Purpose-driven page statement:** New users may not understand what's behind terms such as "Requirements for posting." Because of this, using plainer language, such as *Submit Content* reinforces the page's objective and communicates exactly what users will find and what they should do next.
5. **Table of contents:** The table of contents recaps each type of content a user can submit to iSeek. Clicking on a content type anchor link from the table of contents takes the user down to the corresponding set of submission requirements. In keeping with best practices for anchor links, the title for the table of contents prominently displays at the top, is visually distinct from the rest of the page (as it is contained in a grey box), and each blue link truly looks like a link. As an added bonus, each of the link labels matches flawlessly to the content-type headline that appears in the corresponding section below.
6. **Content types:** Naming conventions for content types are clear and straightforward, making it easy to distinguish them from one another. From their names alone, contributors can envision what the content names stand for, even if they've never actually seen that type of content. An example of each content type in use on iSeek also helps to demonstrate what it actually looks like.
7. **Submission guidelines:** Each set of submission guidelines provides the exact purpose of the content type, and its word/character limits and image/multimedia requirements. The guidelines also include process touch points for each submission, so that contributors know exactly what to do at each step along the way. Links to guidelines, how-to pages, step-by-step tutorials, and checklists within each content type also help to ensure that contributors can effectively self-

serve and get answers to their questions. A convenient *Back to top* link scrolls users back up to the top of the page so they can revisit the table of contents.

Department Homepage

1 Department of Management Strategy, Policy and Compliance (DMSPC)

2 Site map | Offices | Topics | Management Reform | Suggestion box (for DMSPC staff only) | Newsletters

3 The Department of Management Strategy, Policy and Compliance serves the United Nations globally to drive organizational excellence through innovation, accountability and solutions.

4 Under-Secretary-General for Management Strategy, Policy and Compliance

5 What we do

6 Quicklinks

7 News & Updates

8 In the Spotlight

9 Suggestion Box

10 Secretary-General Initiatives

11 Social Media

12 Toolbox

13 Performing enterprise tasks

14 Life as a staff member

15 Rules and reference

Pictured: Department-specific homepages provide context and information for staff members within the department as well as those working outside of it.

Department Homepage Highlights

Because content ownership is distributed on iSeek, department pages are kept tidy and organized through embedded Focal Points. Each year, the amount of content submitted to iSeek from departments increases. As managers and leaders recognize the benefit of reaching staff through iSeek, most have adopted departmental homepages as an integral part of their own department-focused communication strategies.

1. **Department name as H1:** A prominent H1 page title that leads with the full department name, followed by the department's acronym, helps users understand exactly which page they are on and how people typically refer to the department. In an organization as large and cross functional as the UN, these extra details help to maintain clarity and alignment regarding department names and functions.
2. **Department-specific secondary navigation:** Contained in grey tab-like elements, the secondary navigation links to content that's directly related to the department. A sitemap, office locations, topics of interest, information about management reform, a suggestion box for staff, and department newsletters can all be found here. Arrows indicate which menu items have drop-downs containing additional subcategories.
3. **Vision and mission:** The department's vision statement is located at the top of the page, and appears in slightly larger text so that users can immediately see what this department aspires to achieve. A bulleted list containing links to the department's mission statement, annual priorities, and a UN System org chart translated into six languages helps staff members quickly get to know the area. A mini-image carousel allows users to freely peruse a series of featured content recently published by or of importance to the department.
4. **Leader bio:** Offset in a subtle grey box, with a title that directly corresponds to the department's name, staff members can immediately find a biography about the department's leader (under-secretary). An adjacent link to *Read more* is also available for employees who want more information on the department head.
5. **About the department:** The *What We Do* section outlines what the department does, including the functions of its various subdivisions and links to their own iSeek pages, websites, and Facebook and Twitter accounts. Links under the subhead for the office of the Under-Secretary General direct users to committees and services, awards, and content about UN staff day.
6. **Consistent look and placement of widgets:** Department-specific news feeds into department homepages so that relevant information can be disseminated accurately. *Quicklinks* and *In the Spotlight* widgets on the department homepage are consistent with their look and location on the main iSeek homepage. Reliable look and feel and placement of widgets across pages lowers the overall interaction cost of the intranet as users always know exactly where to look to find specific information.

Directory

The screenshot shows the 'United Nations Global Contact Directory' search interface. A search bar at the top contains 'stephanie isseek' and a 'Search' button. Below the search bar, there is a filter for 'Duty station' with 'New York' selected. The results section shows one result for 'Ms. SPIEGEL, Stephanie' with contact details. The interface is annotated with five red circles: 1 points to the search bar, 2 to the 'Close' button, 3 to the filter section, 4 to the results table, and 5 to the 'Update my information' link.

1 United Nations Global Contact Directory 2 Close x

stephanie isseek Search Advanced search »

☐ Exact search

3 Filter search results by duty station (You can select multiple duty stations or click again to deselect):

New York

4 Results 1-1 of 1

Title	Last name	First name	E-mail	Phone	Mobile	Duty station	Building	Room	Org unit
Ms.	SPIEGEL	Stephanie	spiegels@un.org	212-963-6771		New York		S-09FW	DGC/OUTR/KSDS/ISEEK

5 < first 1 last > Update my information | Additional resources

Pictured: iSeek's global contact directory makes it quick and easy to find a colleague's email address, phone number, duty station, and more.

Directory Highlights

The employee directory is iSeek's most-used feature. It relies on a contacts database in which staff can find email and phone contact information for colleagues by searching by name, location, or department. Employees are sure to find who they're looking for given the tool's ability to execute an advanced search or exact search, and filters that enable search by duty station.

- 1. Search area:** Users begin their colleague searches from iSeek's homepage where results appear in a streamlined overlay window. The user's query is passed through to the results overlay, where it is contained in an eye-catching search field. Staff can perform an exact search to find a person who matches exactly what they entered, or an advanced search adding additional parameters to narrow the search scope.
- 2. Close:** An "X" icon closes the overlay, yet iSeek doesn't just assume that users will know what the "X" icon does. Following best practice, the overlay includes the word *Close* in close proximity to the "X" icon to reaffirm what clicking it will do.
- 3. Filters:** Because many large organizations have employees with the same or similar names, filters by duty station allow UN staff to find colleagues at specific locations. Users can sharpen their search by choosing a duty station with the simple click of a filter button labeled with the city (or by clicking again to toggle to deselect).
- 4. People results:** A noticeable results count appears along with the results, which contain the contacts' titles, last names, first names, email addresses, phone numbers, mobile numbers, duty stations, buildings, rooms, and organizational units. This provides everything a colleague needs from an employee directory. And the ability to sort alphabetically by last name and a clear pagination element make this results set really stand out.
- 5. Update information:** Who hasn't searched for themselves on a company directory or search engine? If staff members notice a discrepancy in their listing, iSeek directs them to the office in charge of modifying their personal information through a convenient *Update my information* link. Helpful resources are also available if users run into roadblocks.

Search Results

The UN Intranet - iSeek site search results

gender

Search

Sort by

Relevance Last updated - descending Last updated - ascending

Refine by content type

Announcements/Events (144) Article (511) Book page (1) Circulars (1) DESAlert legacy (152) Library resources (2) Basic page (3)

Staff union articles (12) Departments and offices (478)

Search by duty station:

All duty stations Bangkok Beirut Geneva New York Global

Results 1-10 of 1404

Gender champions recognised with inaugural Gender Award at UNMIK

Article - 2019-03-21 - Global

Champions for Gender Parity

Departmental page - 2019-03-07 - 1136650

DPPA-DPO Gender Parity Strategy Newsletter

Departmental page - 2019-05-24 - 1177950

Letter to SG on Gender Strategy

Staff union articles - 2017-09-25 - Global

Gender

Departmental page - 2018-12-24

DPPA-DPO Gender Parity Newsletter

Departmental page - 2019-05-24 - 1177941

DGACH gender equality in action

Departmental page - 2018-10-01 - Secretariat - Department for General Assembly and Conference Management (DGACH)

Workshop on Gender marker: ESCWA as a model

Announcements/Events - 2017-04-18 - Beirut

Regional Training Workshop to Improve Use of Gender Statistics

Announcements/Events - 2018-10-09 - Beirut

Champions for Gender Parity: Elizabeth Shepar

Article - 2018-10-22 - DPPA

Quicklinks

Forms

Alphabetical Index

The UN Intranet iSeek

About us

The United Nations Intranet, iSeek, was developed in 2003 to encourage knowledge sharing throughout the UN system. Its mission statement is: One Intranet for one UN worldwide.

Contact us

Performing enterprise tasks

Umoja

Umoja

Umoja Production Systems

Umoja on iSeek

Enterprise apps

Need help? Unite Service Desk

Unite Self Service

Inspira

Unite Mail - Outlook

One Drive

Office 365

Unite Docs

Unite Connectors

Unite Correspondence

Forms

ICT resources

ICT FAQs

ICT Policies

ICT Standards

Information Security

Unite Identity Support

OICT Services

Unite Mail/Office 365

Finance and budget

Finance & Budget Manual

Funds Monitoring Tool log in

IPSAS Project

Procurement

Search for contracts

Reporting

INDS log in

Office services

Track 2.0

Conferences

Calendar of Conferences & Meetings

DGACH Doc. Submission

gMeet log in

gOne log in

UNHQ Conference Rooms

UN Journal

UN TV - Webcast

UN, UNDO, CTBT meetings

Life as a staff member

Carriers and jobs

Inspira log in

Career Guidance

Career Options

Examinations

Generic Job Profiles

Job Openings

New to the UN

Pre-Retirement Programme

Gender Parity Strategy

Learning and productivity

Business Card App

Flexible Working Arrangements

Learning Opportunities

Manager's Toolkit

Health and well-being

Health Insurance

Medical Alerts

Medical Services Worldwide

Staff Counsellors Office

Travel Medicine

Pay, benefits and insurance

Your Pay and Benefits

Daily Subsistence Allowance

Pension Fund

UN Official Holidays

Health Insurance

Local Insurance Offices

Travel

Visa - General Information

Official Travel

Online Travel Booking

TRIP log in

Security

Emergency Management

Security and Safety Services Worldwide

Rules and reference

Rules and regulations

Charter of the United Nations

Duties, Obligations & Privileges

HR Handbook

SGR, A/R, ICs and more

Delegation of Authority

Ethics and internal justice

Accountability A to Z

Administration of Justice

Ethics Office

GIR Registry

Ombudsman and Mediation

Reporting Wrongdoing

Response to Sexual Exploitation & Abuse

Taking action on sexual harassment

Library

Ask DAG (FAQ)

Dag Hammarskjöld Library

UN Digital Library

UN Libraries Worldwide

Reference and documents

Accessibility guidelines

Blue Book

Subscription to UN documents

Multilingualism

ODS - Official Document System

Security Council Practice Repertoire

UN Official Country Maps

UN Archives

UN Library

Editing and terminology

Correspondence Manual

Editorial Manual

UNTERM

Public information

www.un.org

UN News

iSeek Guide to News and Resources

UN Web TV

doxGATE

Basic Facts about the UN

Social Media

Back to top

Pictured: Search results on iSeek include sophisticated sorting and filtering mechanisms and a clean, simple page design.

Search Results Highlights

iSeek uses Solr, the approved standard for search technology at the UN. Search results and filters depend on content metadata. In most cases, iSeek uses a combination of faceting and keyword searching, and presents filters for all

normalized metadata fields whenever possible. Over time, search functionality has been enhanced, allowing for more refined results by duty station, level, etc. The team has been working on the next step to improve search, which is to offer preferred results from curated terms to help staff go directly to the most relevant pages. Unpublishing older content is also part of the efforts to improve search over time and to avoid crowding the results with old stories.

1. **Search area:** A prominent search bar lives in the header so users can search from any page on iSeek. When they click of the search button, results display on this uncluttered page template. The query is maintained and passed through to the results page, where users can then search for files, forms, and documents by selecting the appropriate checkbox underneath the search field.
2. **Sorting and refinements:** Users can sort search results by relevance, from oldest to newest, and from newest to oldest. They can also refine results through various facets—such as announcements and events, news articles, pages, departments, and duty stations—and remove search refinements with a simple click. A noticeable results count helps users understand how many results the set contains.
3. **Results:** Each result listing prominently features a clearly linked page title, which matches the H1 on the page. Also contained in each result listing is the content type, which matches perfectly with the refinements above; the date of publication; and the duty station or department to which the piece or page belongs.
4. **Pagination:** The consistent pagination element matches the refinements design and closely mirrors the design of this component across other iSeek pages.

AppCatalog

The screenshot displays the 'Unite AppCatalog' interface. At the top, there's a navigation bar with 'Home', 'About Us', 'Contact Us', 'Privacy Policy', 'Terms of Use', 'Help', 'Feedback', 'Log Out', and 'Sign In'. Below this, a search bar and a 'Found 0 on (0/0)' indicator are present. The main content area is a grid of application cards, each with an icon, title, and a brief description. The cards are organized into sections: 'Unite AppCatalog' (introduction), 'Unite Mail', 'Unite InfoSec', 'Unite Identity', 'Unite Self Service', 'Word', 'PowerPoint', 'Excel', 'OneNote', 'OneDrive for Business', 'Unite Connections', 'Unite Docs', 'Skype for Business', 'Unite Search', 'HR Portal', 'Careers Portal', 'Inspira', 'Umogo', 'Unite VC', 'The UN Intranet-iseek', 'Unite Ideas', 'Grants Dashboard', 'Programmatic Reporting Dashboard', 'Unite Dashboards', 'Mandatory Learning', 'Lynda.com', 'Inspira Learning', 'Umogo Training', 'UNOSS Training Portal', 'UNOSS TRIP', 'Unite Correspondence', 'UNOSS Portal', 'Unite Ineed', 'EarthMed', 'Financial Disclosure Programme', 'Fuel Management', 'Rations Management', 'Contingent Owned Equipment', 'Teams', 'Official Document System', and 'SharePoint'. Each card includes a 'Learn more' link and a 'Get support' link. On the left side of the grid, there are three red circles with numbers 1, 2, and 3, highlighting specific sections. At the bottom of the grid, there's a 'Tools' section with a 'Quicklinks' sidebar and a 'Tools' table. The 'Tools' table has four columns: 'Performing enterprise tasks', 'Life as a staff member', 'Rules and regulations', and 'Reference and information'. The 'Tools' table lists various tools and resources, including 'Umogo', 'Unite Mail', 'Unite InfoSec', 'Unite Identity', 'Unite Self Service', 'Unite Search', 'HR Portal', 'Careers Portal', 'Inspira', 'Umogo', 'Unite VC', 'The UN Intranet-iseek', 'Unite Ideas', 'Grants Dashboard', 'Programmatic Reporting Dashboard', 'Unite Dashboards', 'Mandatory Learning', 'Lynda.com', 'Inspira Learning', 'Umogo Training', 'UNOSS Training Portal', 'UNOSS TRIP', 'Unite Correspondence', 'UNOSS Portal', 'Unite Ineed', 'EarthMed', 'Financial Disclosure Programme', 'Fuel Management', 'Rations Management', 'Contingent Owned Equipment', 'Teams', 'Official Document System', and 'SharePoint'.

Pictured: *Unite AppCatalog* displays an extensive inventory of all the digital applications used by the UN. Beyond the links to these resources, it also directs users to help, training, and support.

Global | [Addis Ababa](#) | [Bangkok](#) | [Beirut](#) | [Geneva](#) | [Nairobi](#) | [New York](#) | [San Diego](#) | [Vienna](#) | [Field Missions](#) | [My account](#) | [Log out](#) | [English](#) | [Français](#)

The UN Intranet iSeek | Global | 1 found it on iSeek!

TOOLKIT | TOPICS | DEPT/SOFTWARES | EMERGENCY | iSEEK INFO | APPS | DIRECTORY

Unite Mail

[Site map](#) | [Training & Guides](#) | [Log in to Office 365 apps](#) | [Contact us](#)

Global Online AppDesk > Unite Mail

few technologies are as ubiquitous as email in today's hyper-connected world. We all depend heavily on email in our day-to-day work.

Unite Mail (Microsoft Outlook) provides everything you need to manage a busy inbox and a packed calendar. The perfect team tool, Unite Mail lets you check calendar, retrieve contacts and set up meetings from any device.

Features

- Significantly larger mailboxes (100 gigabytes) for primary mailboxes
- Truly unlimited archive space
- A common email for entire Secretariat (@un.org)
- 99.9% reliability of service
- 24/7 support (<https://seek.un.org/unite-service-desk>)

Tips & Announcements

- Skype for Business Tip #9: Set up Skype for Business meeting in Outlook
- Email management tool added to Unite Self Service
- Unite Mail - Email Tip #3 How to Delete a Message from Your List
- Unite Mail - Email Tip #2 How to Forward a Message
- Unite Mail - Email Tip #1: How to Search for Messages

[Read more](#)

Benefits

- Multi-factor authentication to protect against cyber threats
- Email and calendar accessibility from anywhere via any modern browser from any computer
- Mobile access to email and calendar availability via mobile apps
- Focused inbox for prioritizing messages, ensuring you see the most important information first
- Scheduling Assistant for quick and easy meeting set up with multiple participants

App Resources

Open Unite Mail: unite.un.org/mail
Open Office 365: portal.office.com

Tips & Tricks

- All Unite Mail (Outlook) Tips
 - Email tips
 - Calendar tips
 - Contacts tips
- More tips & tricks (from Microsoft)

Guides

- Getting started (français, español)
- Unite Notes to Office 365 Guide

This guide compares Lotus Notes to Outlook and highlights key differences in functionality

- 101 intro to Unite Mail

Training

Frequently Asked Questions

Need help?

Unite Service Desk

Around-the-clock support:
<https://seek.un.org/unite-service-desk>

we can help you
[unite.un.org/unite-service-desk](https://seek.un.org/unite-service-desk)

Workshops

Sign up for AppDesk workshops to learn how to use this and other apps

How do I type my email with Outlook?

How do I search in Unite Mail?

Social Media

[Facebook](#) [Twitter](#)

Quicklinks	Performing enterprise tasks	Life as a staff member	Rules and reference
Forms	Umoja	Careers and jobs	Rules and regulations
Alphabetical index	Umoja	Inspira log-in	Charter of the United Nations
	Umoja Production Systems	Career Guidance	Duties, Obligations & Privileges
	Umoja on iSeek	Career Options	HR Handbook
		Examinations	SGRs, AG, ICs and more
		Generic Job Profiles	Delegation of Authority
		Job Openings	Ethics and Internal Justice
		News to the UN	Accountability A to Z
		Pre-Retirement Programme	Administration of Justice
		Gender Parity Strategy	Ethics Office
			Gift Registry
			Ombudsman and Mediation
			Reporting Wrongdoing
			Response to Sexual Exploitation & Abuse
			Taking action on sexual harassment
			Library
			Ask DAG (FAQ)
			Dag Hammarskjöld Library
			UN Digital Library
			UN Libraries Worldwide
			Reference and documents
			Accessibility guidelines
			Blue Book
			Subscription to UN documents
			Multilingualism
			ODS - Official Document System
			Security Council Practice Reporters
			UN Official Country Maps
			UN Archives
			UN Library
			Editing and terminology
			Correspondence Manual
			Editorial Manual
			UNTERM
			Public information
			www.un.org
			UN News
			iSeek Guide to News and Resources
			UN Web TV
			deGATE
			Basic Facts about the UN
			Social Media

[Back to top](#)

Pictured: *Learn More* buttons take users to a designated page for each digital application where they find a brief introduction to the software and its features, user guides, the latest tips and tricks, training opportunities, and how to get support.

AppCatalog Highlights

Recently created to help staff move toward a single set of shared tools, facilitate increased productivity, and support collaboration, the *Unite AppCatalog* shows the

full suite of digital applications available to UN staff. These global solutions strengthen security and performance across the organization and allow employees to collaborate in new ways, centralize information, make better-informed decisions, and much more. Using the same systems across the UN means that staff members do not have to learn new systems or sacrifice their data and information when changing jobs or duty stations. These tools also better support telecommuting and nontraditional work environments.

1. **Page title and copy:** A straightforward page title and introductory body copy lets UN employees know exactly what the *AppCatalog* does and why these tools are so important to their work.
2. **Filters:** Consistent with the filter presentation and functionality in other areas of iSeek, the *AppCatalog* filters help users narrow the set of application results to a specific job function or branded suite of tools.
3. **Application spaces:** For each application, such as Microsoft Outlook, there is an icon, a clear description of the software and its purpose, a link that opens the application, links to how-to guides, training opportunities, and user support hosted on iSeek.

Jobs

Jobs

To find job openings, either type search terms (duty stations, post title or level, etc.) in the box or choose from the categories on the left to start or narrow your search. This is an automated feed from Inspira for jobs at the UN Secretariat. Contact Inspira for help. For UN system jobs: [iSeek_intranet](#). For humanitarian jobs: [SolidFeed](#).

Enter search terms

4 results

1 **2** **3**

Duty Stations

BAMAKO (4)

TJO?

Select TJO?

Level

Select Level

Department

Select Department

Job Networks

Select Job Networks

Job Families

Select Job Families

Posting: CHIEF OF UNIT, RISK MANAGEMENT AND COMPLIANCE.P4
Duty station: BAMAKO
Level: P-4
Job network: Management and Administration
Department: United Nations Multidimensional Integrated Stabilization Mission in Mali
Start date: 26 Jun 2019
End date: 25 Jul 2019
TJO? No
Inspira link: <https://careers.un.org/lbw/jobdetail.aspx?id=118748>

Posting: SENIOR WOMEN'S PROTECTION ADVISER.P5
Duty station: BAMAKO
Level: P-5
Job network: Political, Peace and Humanitarian
Department: United Nations Multidimensional Integrated Stabilization Mission in Mali
Start date: 24 Jun 2019
End date: 22 Jul 2019
TJO? No
Inspira link: <https://careers.un.org/lbw/jobdetail.aspx?id=118215>

Posting: SECURITY SECTOR REFORM OFFICER.P3
Duty station: BAMAKO
Level: P-3
Job network: Political, Peace and Humanitarian
Department: United Nations Multidimensional Integrated Stabilization Mission in Mali
Start date: 8 Jul 2019
End date: 22 Jul 2019
TJO? No
Inspira link: <https://careers.un.org/lbw/jobdetail.aspx?id=119638>

Posting: PROPERTY DISPOSAL OFFICER.F56
Duty station: BAMAKO
Level: F-6
Job network: Logistics, Transportation and Supply Chain
Department: United Nations Multidimensional Integrated Stabilization Mission in Mali
Start date: 17 Jul 2019
End date: 31 Jul 2019
TJO? No
Inspira link: https://inspira.un.org/jsp/UNCAREERS/EMPLOYEE/HRMSA/UN_CUSTOMIZATIONS.UN_JOB_DETAIL.GBL?Page=UN_JOB_DET&Action=MainJobOpening&id=120634

ToolKit

Quicklinks	Performing enterprise tasks	Life as a staff member	Rules and reference
Forms	Umoja	Careers and jobs	Rules and regulations
Alphabetical Index	Umoja Production Systems	Inspira log-in	Charter of the United Nations
The UN Intranet iSeek	Umoja on iSeek	Career Guidance	Duties, Obligations & Privileges
About us >	Enterprise apps	Career Options	HR Handbook
The United Nations Intranet, iSeek, was developed in 2005 to encourage knowledge sharing throughout the UN system. Its mission statement is: One Intranet for one UN worldwide.	Need Help? Unite Service Desk	Examinations	SCBs, AIs, ICs and more
Contact us >	Unite Self Service	Generic Job Profiles	Delegation of Authority
	Inspira	Job Openings	Ethics and internal justice
	Unite Mail - Outlook	New to the UN	Accountability A to Z
	One Drive	Pre-Retirement Programme	Administration of Justice
	Office 365	Gender Parity Strategy	Ethics Office
	Unite Connections	Learning and productivity	Gift Registry
	Unite Correspondence	Business Card App	Ombudsman and Mediation
	Forms	Flexible Working Arrangements	Reporting Wrongdoing
	ICT resources	Learning Opportunities	Response to Sexual Exploitation & Abuse
	ICT FAQs	Manager's Toolkit	Taking action on sexual harassment
	ICT Policies	Health and well-being	Library
	ICT Standards	Health Insurance	Asa DAs (PAC)
	Information Security	Medical Alerts	Dag Hammarskjöld Library
	Unite Identity Support	Medical Services Worldwide	UN Digital Library
	OICT Services	Staff Counsellors Office	UN Libraries Worldwide
	Unite Mail/Office 365	Travel Medicine	Reference and documents
	Finance and budget	Pay, benefits and insurance	Accessibility guidelines
	Finance & Budget Manual	Your Pay and Benefits	Blue Book
	Funds Monitoring Tool log-in	Daily Subsistence Allowance	eSubscription to UN documents
	PSAS Project	Pension Fund	Multilingualism
	Procurement	UN Official Holidays	ODS - Official Document System
	Search for contracts	Health Insurance	Security Council Practice Repertoire
	Reporting	Local Insurance Offices	UN Official Country Maps
	MBIS log-in	Travel	UN Archives
	Office services	Visas - General Information	UN Library
	Track 2.0	Official Travel	Editing and terminology
	Conferences	Online Travel Booking	Correspondence Manual
	Calendar of Conferences & Meetings	TRIP log-in	Editorial Manual
	ISACM Doc. Submission	Security	UNTERM
	gMeet log-in	Emergency Management	Public information
	gDoc log-in	Security and Safety Services Worldwide	www.un.org
	UNHQ Conference Rooms		UN News
	UN Journal		iSeek Guide to News and Resources
	UN TV - Webcast		UN Web TV
	UN, UNIDO, CTBTO meetings		deGATE
			Basic Facts about the UN
			Social Media

Back to top

Pictured: A searchable database of all available jobs is fully integrated into iSeek so staff members can find positions at other UN offices.

Jobs Highlights

iSeek integrates a jobs feed from another UN enterprise application that supports talent management and training. Relevancy is achieved for the job search application

by expiring old content automatically and offering both keyword searching and powerful faceting.

1. **Jobs introduction:** Users see the same bright yellow briefcase icon here, which is reminiscent of its use on the homepage to represent jobs. These consistent threads signify users are in the right place if they are looking for a new job. Brief helper copy leads users to search by keywords, duty stations, or the filter categories on the left side of the page. The search box itself contains a helpful reset button that will clear the current query and allow users to start fresh on their quest for a new job.
2. **Filters:** Jobs have six different filter facets, including duty station, temporary job opening (TJO), level, department, network, and job family. Once a specific facet is applied, it shows up under the respective filter. Users can remove the attributes by clicking the "X" icon found on each refinement. As more filters are added or removed, the quantity of results updates accordingly.
3. **Job openings:** Alternating grey and white backgrounds help offset different list items in the job results. Each position includes parameters that exactly match the filters on the left, as well as start dates, end dates, and links to apply for the job.

Business Card App

[Global](#) | [Africa](#) | [Americas](#) | [Europe](#) | [Middle East](#) | [New York](#) | [Pacific](#) | [Regional](#) | [Services](#) | [United Nations](#)

[My account](#) | [Log out](#)

Global

[TOOLKIT](#) | [TOPICS](#) | [DEPT/SOFTWARES](#) | [EMERGENCY](#) | [ISEEK INFO](#) | [APPS](#) | [DIRECTORY](#)

Print your business cards

1

This application allows you to create and generate a printer-friendly PDF of your United Nations business cards. You also have the option to print: a) the cover of the official "United Nations cards", b) doves, c) the ten actions appearing on the "United Nations cards", or d) the 17 Sustainable Development Goals on the reverse of your business cards.

For best results, it is recommended that you download the generated PDFs and have your business cards produced in a print shop. However, you can also do it yourself using the template with 10 business cards on special pre-perforated paper, in either A4 or US letter size.

Printing instructions:

- Save the PDF from your browser and open the PDF in Adobe Acrobat to print. You may receive unexpected results if you print the PDF directly from your web browser.
- Print the business cards at Actual size or 100 percent, do not use reduce/enlarge options such as "Scale to Fit" or "Shrink oversized pages".
- Set the printer document size to the same size as selected when generating the business cards, either A4 or US letter size.
- Depending on your printer, you may need to use a manual feed for the paper. In this case, set "Input tray" to "Bypass tray".

2

Create your business cards in English

Create your business cards in French

Print cards you previously created (if you are not already logged in)

You will be prompted to log in if you haven't done so yet, using your United ID credentials. Contact [iseek@un.org](#) if you need help or assistance logging in.

3

4

If you'd like, choose one of these four designs for the back of your card.

Your Business Cards

Date Created	Front (10 cards)	Back (10 cards)	Front (1 card)	Back (1 card)	Edit	Delete
Stephanie - Thursday, 29 November 2018 - 10:09	Print PDF	Print PDF	Print PDF	Print PDF	edit	delete
Stephanie - Thursday, 29 November 2018 - 9:45	Print PDF	Print PDF	Print PDF	Print PDF	edit	delete
Stephanie Spragel - Thursday, 13 August 2015 - 10:38	Print PDF	Print PDF	Print PDF	Print PDF	edit	delete

Toolkit

Quicklinks

Forms

Alphabetical Index

About us

The United Nations Intranet, iSeek, was developed in 2005 to encourage knowledge sharing throughout the UN system. Its mission statement is: One Intranet for one UN worldwide.

Contact us

Performing enterprise tasks

Umoja

Umoja Production Systems

Umoja on iSeek

Enterprise apps

Need Help? UN Service Desk

United Self Service

Inspira

United Mail - Outlook

One Drive

Office 365

United Docs

United Connections

United Correspondence

Forms

ICT resources

ICT FAQs

ICT Policies

ICT Standards

Information Security

United Identity Support

QCCT Services

United Mail/Office 365

Finance and budget

Finance & Budget Manual

Financial Reporting Tool log in

IFIAS Project

Procurement

Search for contracts

Reporting

MDIS log in

Office services

ITrack 2.0

Conferences

Calendar of Conferences & Meetings

GGACN Doc. Submission

gMets log in

gDoc log in

UNHQ Conference Rooms

UN Journal

UN TV - Webcast

UN, UNIDO, CTBTO meetings

Life as a staff member

Careers and jobs

Inspira log in

Career Guidance

Career Options

Examinations

Generic Job Profiles

Job Openings

New to the UN

Pre-Retirement Programme

Gender Parity Strategy

Learning and productivity

Business Card App

Flexible Working Arrangements

Learning Opportunities

Manager's Toolkit

Health and well-being

Health Insurance

Medical Alerts

Medical Services Worldwide

Staff Counsellors Office

Travel Medicine

Pay, benefits and insurance

Your Pay and Benefits

Daily Subsistence Allowance

Pension Fund

UN Official Holidays

Health Insurance

Local Insurance Offices

Travel

Visas - General Information

Official Travel

Online Travel Booking

TRIP log in

Security

Emergency Management

Security and Safety Services Worldwide

Rules and reference

Rules and regulations

Charter of the United Nations

Duties, Obligations & Privileges

HR Handbook

SGRs, AAs, ICs and more

Delegation of Authority

Ethics and Internal Justice

Accountability A to Z

Administration of Justice

Ethics Office

GR Registry

Ombudsman and Mediation

Reporting Wrongdoing

Response to Sexual Exploitation & Abuse

Taking action on sexual harassment

Library

Ask DAG (FAQ)

Dag Hammarskjöld Library

UN Digital Library

UN Libraries Worldwide

Reference and documents

Accessibility guidelines

Blue Book

eSubscription to UN documents

Multilingualism

ODS - Official Document System

Security Council Practice Repertoire

UN Official Country Maps

UN Archives

UN Library

Editing and terminology

Correspondence Manual

Editorial Manual

UNTERM

Public information

[www.un.org](#)

UN News

iSeek Guide to News and Resources

UN Web TV

deluGATE

Basic Facts about the UN

Social Media

[Back to top](#)

Pictured: iSeek's business card application allows staff to customize their own business cards, starting with a standard template.

350

INFO@NNGROUP.COM

United Nations (UN) (2020)

Business Card App Highlights

Before the launch of this application, there was no common template for UN business cards, and every office had its own—inconsistent—card design. This application conveniently generates a print-ready PDF and even stores past versions of business card designs. Employees can print the cards themselves or take the PDF to a print shop.

1. **Purpose-driven page title and visuals:** The page title is straightforward and tells users exactly what they can do with the content they find here. A visual of the front of the finished business cards sets expectations for what the card will look like and helps users understand which areas they need to customize.
2. **Helper copy:** Concise helper copy indicates that users can choose from one of four different designs for the back of their business cards. The text also recommends that users take the print-ready PDF to a print shop, but also provides clear directions for exactly how to print the cards—and which paper to use—if employees prefer to print the cards themselves.
3. **Multilingual and saved cards:** Users can create and print business cards in either French or English. In addition, an anchor link scrolls users down to the bottom of the page where they can see a table with all previous versions of their business card designs so they can print cards that they've previously created seamlessly.
4. **Back-of-card artwork:** Images that showcase the four different card-back options also aid users in making an informed decision about which design to choose.
5. **Saved previous cards:** Employees can also access past versions of their UN business cards. From the table, which is pleasantly offset with alternating blue and white rows, users can download PDFs, edit the designs, or delete them from their account. The card creation date and time make it easy to keep many different versions straight.

Classifieds

The screenshot displays the 'Classifieds' section of the UN Intranet iSeek. At the top, there's a navigation bar with links like 'Global', 'Addis Ababa', 'Bangkok', etc. Below this, the 'Classifieds' header is marked with a red circle 1. A search bar with a magnifying glass icon is marked with a red circle 2. On the left, a sidebar contains filters for 'Category' (Housing, Services, Items for Sale, etc.) and 'Location' (ESCAP, ESCWA, etc.), with a red circle 3 highlighting the 'Items for Sale' category. The main content area shows a grid of car listings, including 'Mercedes C200, 2015 Model', 'Grand Cherokee', 'Infiniti FX35 for sale', 'GMC Envoy for sale', and 'HONDA CR-V DIPLOMATIC CAR FOR SALE'. A red circle 4 highlights one of these listings. At the bottom left, a 'Quicklinks' sidebar is marked with a red circle 5, containing links like 'Forms', 'Alphabetical index', and 'The UN Intranet iSeek'.

Pictured: One of the most popular iSeek features is *Classifieds*, which allow the UN's global workforce to buy and sell to each other. This is particularly helpful as staff members regularly move to new duty stations.



Global -

I found it on iSeek!



TOOLKIT | TOPICS | DEPT/SOFTWARE | EMERGENCY | iSEEK INFO | APPS | DIRECTORY

Classifieds

Category: Furniture | Location: UNODG - Geneva
Friday, 21 June 2013 | Submitted by SSYED1

Table and chair set



Wooden table and five chairs with upholstered seats (changeable).
100 francs. Come and collect by 28 June.

Prévisions-Mobles.

Contact: Safir Syed, +41-79-483-6053, tcd96@hotmail.com

Contact SSYED1 (syed5@un.org)

1

Post an ad

Rules / FAQ

Rules for posting:

Communication or exchange of information through this classifieds section must be in accordance with ST/SG/2004/15.

Keep your ads free free.

Do not post any housing ad requesting fees, monetary commissions for housing services or charging in any way any extra fees to UN staff members.

If you do not have any responsibility regarding your listing(s), do not use this system.

Please note that your ads will be unpublished after 30 days, and photos and files deleted after 60 days.

Please note that the United Nations and iSeek cannot be held responsible for the content of the classifieds.

Report an ad or send us suggestions.

If you are working for an external organization based in Geneva and wish to post an ad, click here. For anywhere else in the world, send us an email.

Questions? Check our FAQs

Here or send us an email at iSeek@un.org. This is a UN Intranet iSeek application for the exclusive use of UN Staff.

Toolkit

Quicklinks

Forms

Alphabetical Index



About us >

The United Nations Intranet, iSeek, was developed in 2005 to encourage knowledge sharing throughout the UN system. Its mission statement is: One Intranet for one UN worldwide.

Contact us >

Performing enterprise tasks

Umoja

Umoja
Umoja Production Systems
Umoja on iSeek

Enterprise apps

Need Help? Unite Service Desk

Unite Self Service

Inspira

Unite Mail - Outlook

One Drive

Office 365

Unite Docs

Unite Connections

Unite Correspondence

Forms

ICT resources

ICT FAQs

ICT Policies

ICT Standards

Information Security

Unite Identity Support

OICT Services

Unite Mail/Office 365

Finance and budget

Finance & Budget Manual

Funds Monitoring Tool log in

IPSAS Project

Procurement

Search for contracts

Reporting

MDIS log in

Office services

iTrack 2.0

Conferences

Calendar of Conferences & Meetings

DGACM Doc. Submission

gMeets log in

gDoc log in

UNHQ Conference Rooms

UN Journal

UN TV - Webcast

UN, UNIDO, CTBTO meetings

Life as a staff member

Careers and jobs

Inspira log in

Career Guidance

Career Options

Examinations

Generic Job Profiles

Job Openings

New to the UN

Pre-Retirement Programme

Gender Parity Strategy

Learning and productivity

Business Card App

Flexible Working Arrangements

Learning Opportunities

Manager's Toolkit

Health and well-being

Health Insurance

Medical Alerts

Medical Services Worldwide

Staff Counsellors Office

Travel Medicine

Pay, benefits and insurance

Your Pay and Benefits

Daily Subsistence Allowance

Pension Fund

UN Official Holidays

Health Insurance

Local Insurance Offices

Travel

Visas - General Information

Official Travel

Online Travel Booking

TRIP log in

Security

Emergency Management

Security and Safety Services Worldwide

Rules and reference

Rules and regulations

Charter of the United Nations

Duties, Obligations & Privileges

HR Handbook

SGBs, AIs, ICs and more

Delegation of Authority

Ethics and internal justice

Accountability A to Z

Administration of Justice

Ethics Office

Gift Registry

Ombudsman and Mediation

Reporting Wrongdoing

Response to Sexual Exploitation & Abuse

Taking action on sexual harassment

Library

Ask DAC (FAQ)

Dag Hammarskjöld Library

UN Digital Library

UN Libraries Worldwide

Reference and documents

Accessibility guidelines

Blue Book

eSubscription to UN documents

Multilingualism

ODS - Official Document System

Security Council Practice Repertoire

UN Official Country Maps

UN Archives

UN iLibrary

Editing and terminology

Correspondence Manual

Editorial Manual

INTERM

Public information

www.un.org

UN News

iSeek Guide to News and Resources

UN Web TV

deleGATE

Basic Facts about the UN

Social Media

Back to top

Pictured: On the *Classifieds* detail pages, users can see a larger image of the item, a brief description, and who to contact if interested.

Home • Add content

Create Classified Ad

1 Please note that this is a UN Intranet-iSeek application for the exclusive use of UN Staff. Users should be aware that any communication or exchange of information through this classifieds section must be in accordance with ST/SGR/2004/15.

Please note that the United Nations and iSeek cannot be held responsible for the content of the classifieds.

Rules for posting:

- Keep your ads **fee free**.
- Do not post any housing ad requesting fees, monetary commissions for housing services or charging in any way any extra fees to UN staff members.
- If you do not have any responsibility regarding your listing(s), do not use this system.

By using this application hosted on the UN Intranet-iSeek, and your official e-mail, you are acknowledging that other UN staff members have the right to hold you responsible for and to contact you directly if there is a problem with your listing, even if the listing was not about a service directly related to you. iSeek reserves the right to delete ads that do not comply with these rules.

Thank you for your kind attention to these necessary rules.

☐ I have read and agree to these rules *

Ad Title *

2 **CLASSIFIED AD EXPIRATION**

☒ Define expiration date automatically, based on the ad category.

☐ Define expiration date manually

Ad expiration date

Aug 1, '18 1, 2019 1

This field will only be applied if the date is defined manually.

3 **Ad Category ***

- Select a value - 1

The category of your Classified Ad

Ad Location

- None - 1

Location that fits best

4 **AD PHOTO**

Show row weights

Select

Select

Select

Select

Select

Cropping the Summary Image is strongly recommended, follow the steps below.

1. Upload Photo
2. Click Edit
 1. Click Photo Thumbnail
 2. Select crop area
 3. Save new photo
3. Click the Save button to close the Edit Photo Screen

The Cropping tool does not work with Internet Explorer.

Ad Body

Remaining characters: 4000

Text format: Filtered HTML 1

More information about text formats

- Web page addresses and e-mail addresses turn into links automatically.
- Allowed HTML tags: <a> <cite> <blockquote> <code> <dl> <dt> <dd>
- Lines and paragraphs break automatically.

Publishing options

Published ☒ Published

Save

Pictured: Rather than having posts vetted before they appear, staff can post directly. They must acknowledge the rules, however, and they are responsible for what they post.

Classifieds Highlights

iSeek *Classifieds* offer a safe, user-friendly space for employees to sell items or start looking for a new place to live. The platform is safe because users know they will be

selling, buying, or renting to and from their peers; it is user-friendly because they can easily find services, housing, or items for sale at their location or another duty station. *Classifieds* is also a powerful magnet for staff from other entities within the UN System, who regularly request individual access to iSeek if their organization doesn't provide it.

1. **Posting and rules:** Evolved from a physical bulletin board to a modern digital version, users can quickly post an ad without training or assistance, with a clear set of rules and FAQs to preserve the integrity of the listings.
2. **Search:** By automatically expiring old posts after 30 days, *Classifieds* maintains its search relevancy. A convenient reset button helps users quickly start a fresh search.
3. **Filters:** UN employees can filter classifieds by item categories and locations. Multiple refinements can be added to better refine the results.
4. **Classified ads:** Each classified ad contains an image, clickable headline, posting date, seller name, description, and location. The grey containers keep the structured content and page grid tidy, allowing users to scan the items available.

Sports, Games, Clubs

[illegible]

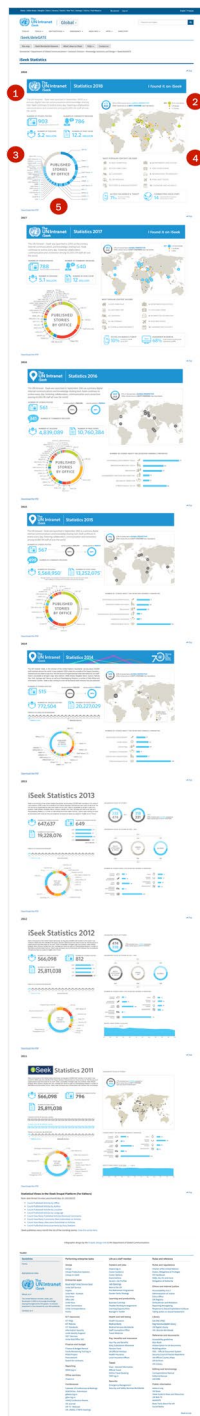
Pictured: iSeek includes pages for sports, games, and clubs to build community, promote health and wellness, and provide outlets for employees who share common interests.

Sports, Games, Clubs Highlights

On these pages, which use a consistent iSeek template, employees can see photos from events at the more than 60 participating clubs, as well as understand each group's vision and get to know the instructors or people in charge. Links to social media channels such as Facebook also help employees feel welcome and stay informed about what's going on with the club.

1. **Photo gallery and vision:** Users can freely scroll through a gallery of photos from club events and happenings. Rather than containing these photos in an animated gallery, which can be quite distracting, the arrow icons make it easy for employees to remain in control of the photo browsing experience. The transparent, consistently placed vision statement communicates the club's purpose and what it aspires to achieve.
2. **Sponsor information:** Here, employees can find information about the club's leaders and leadership council. Contact information, including a liaison phone number, is also posted. This leadership module has a consistent appearance and placement across iSeek pages.
3. **Coaches and schedule:** Contained in a grey content slot, employees can get information about when classes are offered, the coaches and instructors who will lead the sessions, the cost, and what the program entails. A table below outlines when various events will take place, who to contact with questions, where the events will be held, and how much participation costs.

iSeek Statistics



Pictured: This feature gives employees a behind-the-scenes look at platform analytics over time and is presented in a visually appealing infographic format.

iSeek Statistics Highlights

Featuring data from as far back as 2011, iSeek Statistics provides a historical look at how intranet content and engagement have evolved over time. Users can see how many stories tout a global focus, versus how many are duty-station specific. Stories published by office and the top-10 most popular content types are also among the trends shown. A companion page, *What's New on iSeek*, offers a historical look at the intranet's evolution, listing detailed design, technological, and content updates monthly since 2013 and historical documents and screenshots since 2004.

1. **Content and engagement metrics:** Users can see the number of stories posted, comments received, sessions, and page views. This area's design includes logical iconography and emphasizes numbers in bold blue typeface.
2. **Map:** A visually appealing map showcases the share of stories with a global perspective and those that focus on a particular duty station. The green, yellow, and grey bubbles represent the number of stories contributed from various office locations.
3. **Pie chart:** A perimeter pie chart shows an even more detailed breakdown of stories published by office location.
4. **Top-10 content:** The most popular content on iSeek shows the top-10 most frequently visited sections, along with the annual increase of users who access iSeek via mobile and tablet. It also details the number of special political missions that joined the iSeek platform in 2018.
5. **Download PDF and back-to-top:** Users can also download a PDF of the year-in-review; because this page is quite long, a helpful back-to-top link scrolls users back up.

Emergency and Security Alerts

Global | Africa Region | Bangkok | Beirut | Geneva | Nairobi | New York | Settings | Vienna | Visit Missions | My account | Log out | English | Français

The UN Intranet iSeek | Global

TOOLKIT TOPICS DEPT/SOFTWARES EMERGENCY iSEEK INFO APPS DIRECTORY

Organizational Resilience Management System (ORMS)

1 DMSPC map Contact us

Secretariat > Department of Management Strategy, Policy and Compliance (DMSPC) > Business Transformation and Accountability (BTA) > Accountability Systems > Organizational Resilience Management System (ORMS)

The **Organizational Resilience Management System (ORMS)** is a comprehensive emergency management framework linking actors and activities across the processes of preparedness, prevention, response and recovery to enhance the Organization's resilience in order to improve its capacity to effectively manage the risks of disruptive events.

The ORMS provides an effective means to integrate and harmonize the emergency management activities of crisis management, security, business continuity, ICT disaster recovery, emergency medical support, crisis communications, support to staff & families, records and facilities management. The ORMS provides a framework for cooperation across institutional silos and between the various actors responsible for the key components.

The Sustainability and Resilience Management Unit in the Division for Business Transformation and Accountability in the Department of Management Strategy, Policy and Compliance provides strategic guidance on the ORMS and facilitates the Inter-Agency Community of Practice, wherein the UN system organizations of the Chief Executives Board are represented.

2 What we do

ORMS and UN Staff

Preparedness is the staff members' responsibility and resilience should be part of your day-to-day activities. ORMS's communication plan aims to raise awareness among staff further to influence staff behaviour so that they prepare for crises in professional and private life. Do you want to become more resilient? Click here for staff resilience enhancement tools

Link to ORMS elements

- Security management
- Records management
- ICT Disaster Recovery
- Medical emergency support
- Crisis Communications
- Support to Staff and Families
- Premises Management
- Crisis Management
- Business Continuity Management

3 Contact the Team

Vivram Bhatia
Programme Officer
e-mail bhatia2@un.org
tel. (917) 307-4672
cell (917) 505-8449

Latest news

- It's time to update your emergency contacts in Inspira
- ORMS: Linking actors and breaking silos
- Sign-up for business continuity training on Inspira
- How do we communicate in a crisis?
- Crisis Management - a UN system wide approach

Read more

Resources

Staff resources

- Policies, Guidelines and Reports
- UNHQ Emergency Information
- Emergency Preparedness Guide
- Emergency Contact Information tool
- Death in Service Handbook

External organisations and initiatives

- World Economic Forum (WEF) Global Risks
- Norfolk HVC
- Centers for Disease Control and Prevention (CDC)
- International Center for Enterprise Preparedness
- Towards a Safer World

Document links

Business Continuity Focal Points List

Toolkit

Quicklinks

Forms

Alphabetical Index

The UN Intranet iSeek

About us >

The United Nations Intranet, iSeek, was developed in 2005 to encourage knowledge-sharing throughout the UN system. Its mission statement is: One intranet for one UN worldwide.

Contact us >

Performing enterprise tasks	Life as a staff member	Rules and reference
Umoja	Careers and jobs	Rules and regulations
Umoja	Inspira log-in	Charter of the United Nations
Umoja Production Systems	Career Guidance	Duties, Obligations & Privileges
Umoja on iSeek	Career Options	HR Handbook
Enterprise apps	Examinations	SGRB, AN, VC and more
Need help? Unite Service Desk	Generic Job Profiles	Delegation of Authority
Unite Self Service	Job Openings	Ethics and Internal Justice
Inspira	How to the UN	Accountability A to Z
Unite Mail - Outlook	Pre-Retirement Programme	Administration of Justice
One Drive	Gender Parity Strategy	Ethics Office
Office 365	Learning and productivity	GR Registry
Unite Docs	Business Card App	Ombudsman and Mediation
Unite Connections	Flexible Working Arrangements	Reporting Wrongdoing
Unite Correspondence	Learning Opportunities	Response to Sexual Exploitation & Abuse
Forms	Manager's Toolkit	Taking action on sexual harassment
ICT resources	Health and well-being	Library
ICT FAQs	Health Insurance	Ask DAG (FAQ)
ICT Policies	Medical Alerts	Dag Hammarskjöld Library
ICT Standards	Medical Services Worldwide	UN Digital Library
Information Security	Staff Counsellors Office	UN Libraries Worldwide
Unite Identity Support	Travel Medicine	Reference and documents
DICT Services	Pay, benefits and insurance	Accessibility guidelines
Unite Mail/Office 365	Your Pay and Benefits	Blue Book
Finance and budget	Daily Subsistence Allowance	eSubscription to UN documents
Finance & Budget Manual	Pension Fund	Multilingualism
Funds Monitoring Tool log-in	UN Official Holidays	ODS - Official Document System
IPAS Project	Health Insurance	Security Council Practice Repertoire
Procurement	Local Insurance Offices	UN Official Country Maps
Search for contracts	Travel	UN Archives
Reporting	Visas - General information	UN Library
IMDS log-in	Official Travel	Editing and terminology
Office services	Online Travel Booking	Correspondence Manual
iTrack 2.0	TRIP log-in	Editorial Manual
Conferences	Security	UNTERM
Calendar of Conferences & Meetings	Emergency Management	Public information
DGACH Doc. Submission	Security and Safety Services Worldwide	www.un.org
ghetto log-in		UN News
gDoc log-in		iSeek Guide to News and Resources
UNHQ Conference Rooms		UN Web TV
UN Journal		deliGATE
UN TV - Webcast		Basic Facts about the UN
UN, UNIDO, CTBTO meetings		Social Media

Back to top

Pictured: Emergency information is included in the top menus and emergency messages can be posted at the top of the homepage. An entire page on iSeek outlines, in detail, the processes and protocols during times of crisis.

Emergency and Security Alerts Highlights

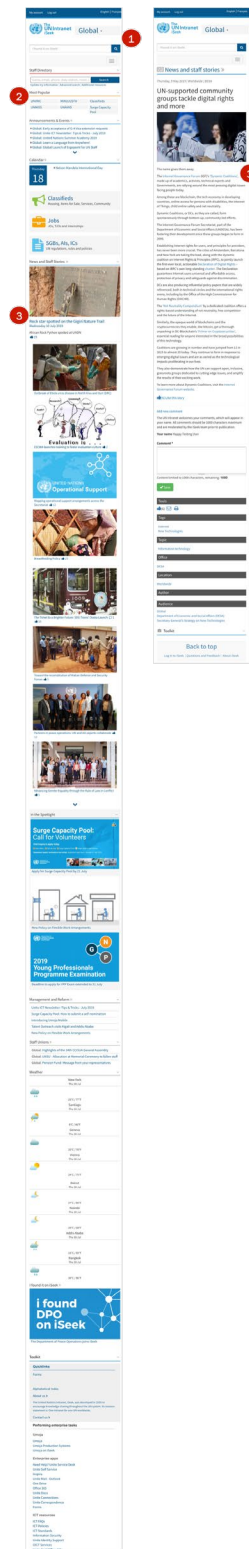
Many UN staff members do not spend much time at a desk; instead, they are in the field, engaged in activities such as removing landmines from a soccer field in a

former conflict zone, coordinating humanitarian assistance at the site of an earthquake, supporting late-night treaty negotiations on the sidelines of an international conference, or providing security at a refugee camp.

The digital tools on iSeek are central to supporting a mobile workforce, and a big part of that is keeping that workforce safe. The intranet was not originally instituted as an emergency response tool, but when Hurricane Sandy hit in 2012, iSeek played a crucial role in informing staff about closures and developments at HQ. The fact that iSeek also manages the posting of broadcast emails has placed it in a central role to disseminate information. Crisis simulation exercises conducted by security and the business continuity offices have revealed that information disseminated on iSeek guides staff members' emergency-related actions.

1. **About the framework:** Introductory copy outlines what the Organizational Resilience Management System (ORMS) does and how it helps to prepare employees for crisis situations and supports them when they occur.
2. **Links to tools:** Text links to contextually relevant, helpful resources stand out in a light grey box. The bulleted list helps to break up each link with ample space in between each clickable phrase.
3. **Familiar modules:** Prominent contact information is available for the program officer. The officer's name stands out in bolded font, and all appropriate contact methods—including email address, telephone, and cell phone—are listed.
4. **ORMS graphic:** The hub-and-spoke graphic illustrates and visually reinforces all of the system's critical functions and elements.

iSeek Mobile



Pictured: iSeek is fully responsive, and UN employees can access it on any device from anywhere in the world.

iSeek Mobile Highlights

iSeek's responsive design means that it looks good on any device. Without a larger team or budget to support a custom application, this mobile design philosophy is both the most practical approach and the one that iSeek users prefer, according to user research.

1. **Intuitive mobile navigation:** The same navigational elements are available across channels, and users can access the duty station menu via the same drop-down style that's available on desktop. Use of the familiar hamburger menu and a subtle grey background calls attention to the primary mobile navigation.
2. **Strategically placed components:** Important elements—such as search, the staff directory, most popular links, and announcements and events—appear well above the mobile fold so that users can retain access to the homepage areas they use the most.
3. **Single column grid:** Use of a single-column grid ensures that content won't get too squished or become too small to be readable and usable on mobile.

DESIGN PROCESS AND USABILITY WORK

An Agile Approach to Design and Development

Since 2015, the iSeek design approach has been iterative.

Two members of the team are primarily responsible for handling user requests and liaising with contributors from offices and departments to ensure that their content looks good, adheres to guidelines, and is regularly updated. And, because they work so closely with iSeek Focal Points, the two team members are well positioned to escalate user issues or suggestions for new features.

The iSeek team uses a ticketing system (Jira) and conducts weekly meetings to communicate with the developer. Together, they set the priorities and establish timelines for improvements. The team's user-centered philosophy is to roll out technical and design changes on a monthly basis, rather than wait for one big redesign.

This "launch first, refine later" approach was a driving factor when the team launched iSeek on Drupal with the previous IA in place. This decision meant that there was no waiting period for an in-depth redesign. Similarly, the team launched the classifieds and jobs pages with basic templates and later refined their functionality and visual design.

Data-Driven Design

The team supports its design decisions with data gathered through qualitative and quantitative methods. For example, the iSeek team ran regular global surveys in 2015, 2018, and 2019 to assess user satisfaction and identify areas for improvement. They also listen to staff during the frequent (once per day on average) team-led trainings, as well as in communications meetings and other forums. Further, they frequently seek feedback and support from the iSeek Focal Point Network.

In addition to all of these active-listening activities, in 2019 the iSeek Team ran focus groups and usability tests, and conducted interviews. This helped the team learn more about what users want—and what they don't.

Google Analytics is also used to track user behavior, page views, and sessions.

This data, drawn from a variety of sources, cumulatively helps the team assess the effectiveness of various types of content or internal communication campaigns.

2019 Research Initiatives

As new staff members from global field locations are brought into the intranet platform, it's especially critical that the team consider their user needs in iSeek's roadmap planning. Thus, as part of the team's continuous design research efforts, it launched several initiatives in 2019 to gauge perceptions of iSeek, understand current usage, and gather insights about pain points in the UX.

This research included:

- **Current state audit** to identify quick wins and longer-term enhancements to align with intranet best practices.

- **Accessibility audit** to identify key considerations for web and mobile accessibility and serve as a template for ongoing reviews.
- **Google Analytics monitoring** at global and local levels to identify popular content and track mobile usage, geographical reach, performance issues, and other trends.
- **User satisfaction survey**, first launched in 2018 and redeployed in 2019, to gather feedback on key features, as well as the perceived value and utility of iSeek. The 2019 survey of a representative sample of 3,000 staff members revealed the user satisfaction levels: 68% Satisfied or Very Satisfied, 24% Neutral, and 7% Somewhat or Very Dissatisfied.
- **One-on-one interviews with iSeek editors and contributors** around the world who serve as trusted partners and ongoing sources of feedback.
- **One-on-one interviews with global iSeek users in field locations** who offer valuable perspectives on their unique needs and ideas for how to direct future iSeek efforts.
- **Focus groups held at UN Headquarters** in New York allowed the team to perform more detailed task analysis and usability testing, as well as discover the content types users value most.

This 2019 work builds on the major 2014 research effort, which the team undertook to inform its complete site redesign in 2015. That earlier research effort included:

- **Analytics review** to understand usage trends and determine which site areas were visited most often and thus should be prioritized in the revised IA and design.
- **Global survey** with six focus groups to understand the functionality, look, feel, and structure the staff was looking for in a new site design.
- **Interviews with senior officials** from seven UN offices to seek high-level feedback and buy-in.

Information Architecture

There were four primary IA requirements:

- More information presented above the fold to give better exposure to announcements and events, classifieds, jobs, and essential UN policy, which were among the top features according to usage statistics.
- More exposure to emergency information, the staff directory, and the user's team information in the top menus.
- Footer should appear on every page and be filled with essential links (*Toolkit*) categorized by themes.
- Site should include news feeds to departmental homepages in order to better disseminate information.

Adoption/Buy-in

In addition to gathering innovative ideas from staff and management about the intranet they would like to see, the findings from the 2015 and 2019 research initiatives lent weight to the iSeek team's vision for the redesigned site as a go-to place for staff information that was user friendly, easy to navigate, and had a more modern look and feel.

GOVERNANCE

Ownership

In other organizations, HR or IT may own the intranet, but at the UN, the Department of Global Communications manages it. And, as the name implies, that department comprises communications professionals who are primarily focused on creating awareness of the organization's work and priorities. Because the iSeek team is situated in this environment, it can attract talented internal information specialists, with skills in information management, graphic design, website development, translation, and communications. So, this ownership model is beneficial because the focus is on effective communication, resulting in a less "corporate" intranet. The challenge with this placement is that the team is located outside of the management department's decision-making process.

INTRANET TEAM RESPONSIBILITIES	
Role	Responsibilities
iSeek Team An eight-person team (six iSeek members, one section manager, and one developer) based in New York	<ul style="list-style-type: none"> • Manages the UN intranet, including providing governance and user support • Trains users and iSeek Focal Points on how to use, edit, and write for iSeek • Designs and develops new features and tools • Creates, reviews, and publishes content • Coordinates the iSeek Focal Point network • Manages access and permissions
iSeek Focal Points a 250-person network	<ul style="list-style-type: none"> • Coordinate the creation and review of internal communication products (articles, graphics, pages, videos) for their respective UN offices, departments, duty stations, or missions • Submit global stories to the iSeek team for publication and may publish local stories directly • Liaise with iSeek team on user issues and needs • Promote iSeek to their users • Represent their office in iSeek Focal Point meetings • Either personally update their content on iSeek or delegate task to Content Editors • Coordinate training and editorial access for Content Editors (with the iSeek Team)
Page Managers and Contributors	<ul style="list-style-type: none"> • Publish content on behalf of their office, staff club, association, etc. • Update information as necessary

URL AND ACCESS

ACCESS INFORMATION	
Item	Status
URL	iseek.un.org
Default Status	The intranet is set as each user's homepage in Internet Explorer and Microsoft Edge browsers, but not in other browsers (such as Chrome).
Remote Access	<ul style="list-style-type: none">• Users need to log in with a valid account (assigned by IT) before accessing iSeek content remotely.• The iSeek team can also create accounts for individuals. This is mainly used to give access to staff from UN entities outside the secretariat.• Remote users can access iSeek via a redirect to the iseek-external.un.org alias.
Shared Workstations	Some users access iSeek from shared workstations in UN libraries. Also, visual signage in the UN Headquarters complex displays a slideshow of iSeek stories and other internal communications content. The iSeek application hosts these slideshows on its infrastructure; although the screens support touch, this interface hasn't been leveraged yet.

TIMELINE

PROJECT MILESTONES	
Milestone Date	Milestone Description
January 1, 2004	<ul style="list-style-type: none"> Launch of the UN intranet, iSeek, an initiative of the Deputy-Secretary-General
August 29, 2005	<ul style="list-style-type: none"> First Redesign
April 6, 2006	<ul style="list-style-type: none"> Integration of the Global Staff Directory
2007	<ul style="list-style-type: none"> The Department of Peacekeeping chooses a different platform, moving away from iSeek.
2011	<ul style="list-style-type: none"> Drupal is approved as an official standard, and iSeek and IT prepare business requirements for development of a Drupal platform. This project is abandoned after IT runs out of resources.
November 7, 2013	<ul style="list-style-type: none"> iSeek is recreated and relaunched on Drupal 7 by its web team, after migration of existing content.
December 2013	<ul style="list-style-type: none"> Commenting feature is introduced, first as a pilot due to concerns by the Department of Management. (The iSeek team moderates comments before they are published.)
September 2014	<ul style="list-style-type: none"> iSeek becomes mobile (responsive) with remote access enabled through password protected log in.
June 2014	<ul style="list-style-type: none"> Calendar view for events, holidays, and UN Days
December 2014	<ul style="list-style-type: none"> Preparation begins for a major redesign, drawing on business requirements from the team, global survey, case studies, focus groups, and interviews with top-level managers.
June 2014	<ul style="list-style-type: none"> Classifieds app launched
May 2015	<ul style="list-style-type: none"> Business card application launched
August 2015	<ul style="list-style-type: none"> Major redesign touches on visual design and IA
December 2015	<ul style="list-style-type: none"> Login credentials now aligned with the UN's enterprise application
April 2016	<ul style="list-style-type: none"> New redesign, including new fonts and a visual look that emphasizes stories, jobs, announcements, and the most popular content
October 2016	<ul style="list-style-type: none"> iSeek team begins offering staff training on platform features (iSeek 101).
February 2016	<ul style="list-style-type: none"> The Department of Social Affairs reintegrates iSeek.

November 23, 2016	<ul style="list-style-type: none"> The regional office in Beirut integrates iSeek and closes its local intranet.
May 2, 2017	<ul style="list-style-type: none"> The regional office in Geneva integrates iSeek and closes its local intranet.
November 2017	<ul style="list-style-type: none"> The regional office in Bangkok integrates iSeek and closes its local intranet.
March 2017	<ul style="list-style-type: none"> Design changes move the jobs sections higher on the page and provide localization for the spotlight content.
July 2017	<ul style="list-style-type: none"> iSeek team relaunches its course on how to write stories and provides coaching for participants.
December 2017	<ul style="list-style-type: none"> With the creation of the <i>Secretary-General Priorities</i> pages, the iSeek team takes on more of an advisory role in communication from the Secretary-General.
April 2018	<ul style="list-style-type: none"> The “I found it on iSeek” communications campaign is launched to raise awareness of the platform’s benefits.
April 2018	<ul style="list-style-type: none"> Jobs search is totally revised to offer a complete feed that contains all jobs available at the UN.
May 2018	<ul style="list-style-type: none"> The Department of Political Affairs integrates iSeek and closes its local intranet, with integration facilitated by extensive online training for contributors.
December 2018	<ul style="list-style-type: none"> The regional office in Nairobi integrates iSeek, but also relaunches its separate local intranet catering to entities outside the Secretariat.
December 2018	<ul style="list-style-type: none"> <i>Classifieds</i> template completely rebuilt
January 2019	<ul style="list-style-type: none"> The Department of Peacekeeping integrates iSeek with a first mission as a pilot.
July 1, 2019	<ul style="list-style-type: none"> The Department of Peacekeeping integrates iSeek and shuts down its local intranet.

CONTENT AND CONTENT CONTRIBUTORS

Contributors and Contributions

Anyone with intranet login credentials—any staff member, entity, branch, or UN department—can contribute content to iSeek. Users can submit content to the iSeek team via a contact form, send an email (for stories or announcements), or post content themselves using the CMS if they have permission to do so.

People can submit content or post directly in several ways:

- **Submit a story on behalf of UN departments or offices:** Most stories are written by communications professionals or subject matter experts in a UN office. Once written, management and the iSeek Focal Point designated by that unit vet the story. It then goes to the iSeek team for review to ensure that it meets the iSeek editorial requirements. Before being published, stories are edited for style and grammar, and then translated. The unit and the iSeek team work together to agree on the story's publication schedule.
- **Staff Voices story:** All staff members can submit posts about personal experiences related to their UN work.
- **Classified ads:** All users can post ads and are responsible for following the rules.
- **Comment:** All users can post comments, which are moderated by the iSeek team.
- **Announcements:** Many contributors are empowered to directly post announcements about events or initiatives using the CMS.
- **Pages:** A smaller, more restricted group of users (verified by their offices) can create pages for their offices and post local content on their respective homepages, such as stories or announcements with a local audience.

A network of more than 250 Focal Points supports contributors from locations across the globe. Focal Points are either communication specialists inside departments or staff members designated by their entity to perform this function in addition to their regular duties.

While most intranet contributions are submitted at the initiative of an office, iSeek team members also constantly monitor the activities/news/work the UN is doing and sometimes ask for contributions on a specific topic or issue.

Content Management

The iSeek team manages articles via an editorial calendar. Once a submission is received, the calendar manager and editors vet the content for accuracy and rules compliance, edit and translate it, and give it a spot in the calendar.

The editorial calendar is used to manage global articles—which appear on every local iteration of iSeek—as well as local articles that are managed by local teams in different departments or duty stations and that appear only on their iteration of iSeek. This allows for greater flexibility and helps increase the feeling of belonging for sub-entities whose staff can read global articles as well as articles that concern only their duty station/entity.

Other types of content are managed according to type:

- **Events and announcements** can be managed either by Focal Points or by staff members who have permission to post these on behalf of their entity.
- **Classified ads**, a popular iSeek feature, are posted by individuals, including staff from other entities that have requested an account.

Training

“Write for iSeek” training sessions are offered regularly to encourage staff members to contribute pieces/articles/stories so that they can share their work with colleagues around the world. By mid-2019, 24 training sessions had been organized and 219 staff members had been trained.

In addition to the writing sessions, training sessions are offered several times a week to teach users how to manage local pages and content. These are aimed at staff members, Focal Points, contributors, and page managers who manage the content on their pages.

So far, approximately 2,000 staff members have been trained to perform various activities on iSeek.

Maintaining Quality

As iSeek’s popularity has increased over the years, staff member content submissions have also increased—though this content does not always fit the quality parameters. To address this, rules and guidelines are offered to staff members to help improve submission quality, and iSeek team members are always available to give advice (in person, by phone, or email) to those who want to write for iSeek. Rather than turn down contributions, the team tries to encourage contributors to improve their text. This approach helps foster the feeling that everyone belongs to the vast community of UN staff members around the world and iSeek is an inclusive platform.

A comprehensive page on the intranet offers specifics on content requirements. Following is an example of the requirements for story posting:

News and Staff Stories

- Maximum of 350 words in English and/or French
- Title is maximum of 65 characters (includes spaces)
- Include 1 to 10 photos (minimum width of 800 pixels, landscape)
- A video from YouTube, Vimeo, or UN Web TV (Brightcove) may be embedded
- Keep in mind the Secretary-General’s priorities of gender parity and diversity when drafting your content, including the visuals
- Be sure to coordinate with your departmental Focal Point and verify that the content is approved by them and/or managers
- Stories written on behalf of a department or office will be sent to iseek@un.org by the Focal Point

The iSeek Team exerts editorial control on applying the iSeek guidelines, especially for length, and makes adjustments regarding style. It also has control over drafting the title and lead.

You will be informed of the day and time the story will be published. The team can provide you with statistics on your content and prepares infographics with yearly statistics on stories.

Culling Content

Because iSeek has kept content, especially stories, since its inception, it has become necessary to establish rules for removing content (that is, deleting or unpublishing it). Unpublishing older content is also part of the effort to improve the search and avoid crowding the search results with old stories. For example, classifieds expire after 30 days, and announcements are unpublished after one year.



Pictured: This page provides the intranet’s founding principles, as well as requirements for iSeek contributors, including details for each type of content and retention policies.

TECHNOLOGY

TECHNOLOGY	
Category	Technology Used
Web Server Hardware and Operating System	<ul style="list-style-type: none">iSeek is hosted on an internal Drupal farm, which is managed by the UN's corporate IT department
Bug Tracking/Quality Assurance	<ul style="list-style-type: none">Jira
Design Tools	<ul style="list-style-type: none">Adobe Creative Cloud
Site Building Tools	<ul style="list-style-type: none">Drupal
Content Management Tools	<ul style="list-style-type: none">Drupal
Search	<ul style="list-style-type: none">Solr
Other Functions	<ul style="list-style-type: none">Git for source code control management

Replacing Obsolete Technology

Until 2014, iSeek was hosted on a combination of outdated technologies, including Lotus Notes and ASP 1.0. These technologies were out of support and lacked integration. Several previous attempts to update iSeek's infrastructure had all been unsuccessful due to migration process complexity and a lack of dedicated personnel. The redesign process that began in 2014 was successful, in part, due to the dedicated collaboration between the UN corporate IT department, the iSeek editorial team, and the iSeek development team.

Rather than take a waterfall approach, discrete sections of iSeek were migrated in iterative sprints, which allowed for more manageable tasks and shorter development cycles. Successful sprints also demonstrated progress to the integrated project team and to management. By the time the entire iSeek application was fully migrated, the project had an iterative development process in place from which to innovate further as it developed new functionalities and applications.

MOBILE

iSeek became available on mobile devices (smartphones, tablets) and any computer browser in 2014—a year before the major redesign. Currently, about 10% of traffic comes from mobile users.

Accessing the intranet remotely was an essential feature for a tool serving an international organization with staff located all around the world. Since iSeek went mobile, all staff members have been able to access it from wherever they are, without being tethered to a local network. This also opened the door for intranet access for employees traveling and telecommuting. In addition, mobile access impacted content contributions, as it made the ability to post remotely a reality. Editors and contributors can now create and edit content on the go. And they can respond to requests to add new content even more quickly.

Mobile access is not only a convenience and an efficiency for the team, but it also provides a pillar of business continuity in times of crisis or emergency. For example, in an emergency, the iSeek Team can alert staff and update them about developments without having to be in the office.

The goals were to make the mobile version easy to access from anywhere and to ensure that it met the accessibility standards for people with disabilities while featuring all the same tools and information as desktop.

iSeek's responsive design means it looks good on any device. And, without a larger team or budget to support a custom app, this approach is both the most practical and the one that iSeek users prefer; in both focus groups and surveys, most UN staff members told the design team that they did not want to download an app onto their personal devices.

Site analytics show that UN staff members are more likely to access iSeek on a desktop computer at their workstation than on a laptop or phone. But such access is changing steadily, especially as the UN is making a hard pivot to support more flexible working arrangements and telecommuting.

iSeek mobile usage grew 71% in 2018; staff members report using iSeek on laptops and smartphones while traveling and working from home, and during their daily commute.

The team's next step in mobile development is to create "iSeek Lite," a low-bandwidth version of the site that is optimized for staff working in conflict zones or remote areas, where internet is patchy and load speeds are slow. The UN staff that work in these challenging field locations are less likely to be working at a desk and more likely to access iSeek from a mobile device.

SEARCH

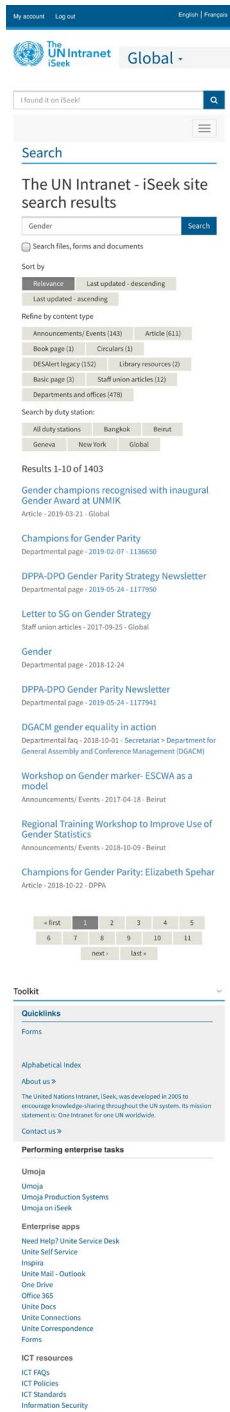
Filtering

iSeek has several different search applications whose filter mechanisms depend on content metadata. In most cases, the intranet uses a combination of faceting and keyword searching. For example, the classifieds search has multilevel facets for category and location, while the jobs search has six different facets. iSeek search results include filters for all normalized metadata fields whenever possible.

Search Relevancy

Making sure the search tool returns relevant results is an ongoing challenge on any intranet. On iSeek, search relevancy is maintained through various means, including expiring old content automatically and offering powerful faceting tools along with keyword search, particularly within applications such as jobs and classifieds.

Search relevancy is also being actively improved through a new UI that will provide a more intuitive filtering process.



Pictured: The default keyword search results page allows for further refinement by content type, duty station, and more.

ROI

Measuring Success Through Metrics

The UN team relies on some hard numbers and some softer measures to gauge the platform's success.

- **Sessions and page views:** The iSeek team reports the annual number of sessions and page views to managers, and a new target is set each year. The number of page views has increased consistently year after year; it currently stands at 12.2 million views annually.
- **Story submissions:** In addition to collecting site traffic and usage statistics, the iSeek Team also tracks which offices and departments have submitted stories to the intranet, as it considers this a KPI. Each year, the number of offices with story submissions increases as more managers recognize the intranet's value as a critical way to communicate with UN staff. For the iSeek team, the overall goal is to ensure that iSeek represents everyone in the organization.

Measuring Success Through Engagement

Each year, the amount of iSeek content submitted from UN offices and departments increases. Managers in these offices recognize the benefit of reaching staff through iSeek and have made it part of their internal communication strategies. For example, in 2016, iSeek published 561 stories. By 2018, that number had grown to 903, and it is on track to climb to more than 1,000 stories annually.

iSeek provides a platform not only for management to talk to staff, but also for staff to respond via comments and likes. With iSeek, individuals can ask questions and expect a response. This sparks conversations between staff and management that otherwise may not have had a place to begin.

LESSONS LEARNED

The iSeek team members have given their lessons learned a lot of thought. They've tried hard to figure out what worked and how to benefit from it, and what didn't and how to learn from it and do better in the future. Among these lessons are the following.

- **Evaluate what "business" you're in.** "The Deputy Secretary-General—the UN's number two—launched the iSeek platform as a vehicle for internal communications, but over time, because of the lack of means and the loss of management engagement, the focus of the team became to manage the intranet. Between then and now, iSeek has come to support more and more staff—over 90% in 2019—and is gaining recognition from the highest levels of all departments. By being at the epicenter of all internal communications and recognized so by the office of the Secretary-General and management, its staff is in a position to create the assets all departments use to promote the priorities of the UN. This positions the iSeek staff as much more than an intranet support organization, as they should be, given the intranet's role in furthering the mission of the UN."

- **Acknowledge the uniqueness of your organization and work with its limitations.** “The United Nations has a culture of consensus. Combined with the global and multidisciplinary nature of the organization, this means decisions require the involvement of all stakeholders. A good example of this culture in action was around adding commenting and liking features on the intranet. The team considered these tools as critical to facilitating more two-way communication in the organization. And while this had become standard functionality on the web, even for internal tools, it was initially challenging to gain the necessary approval to launch this feature at the UN. Management was concerned that staff would voice grievances or post inappropriate content. So the first step was to establish governance rules for the tools: the iSeek Team would vet comments and they would only be published after they were approved and a three-month trial commenced.

“The team quickly learned that staff didn’t submit anything controversial or inappropriate, and over time very few comments were not approved. Only through this trial was the feature allowed to become permanent, and it has since become a much-used tool. And, while this trial was intended to test the reaction to the tool, it also fostered trust between senior management and the intranet team. With earned trust in place, the intranet team is able to respond more quickly to the needs of users.”

- **Engage users where they live.** “As new offices were integrated into iSeek and closed their local intranets, it became apparent that there had to be a balance between global, organization-level stories, and local information. The new Drupal CMS allowed for a combination of local and global stories for each location based on editors’ choices. Now each duty station’s homepage balances global and local content and provides a window to the outside via social media. The importance of this external news was revealed in a survey in which users expressed that they were not simply interested in internal information and that iSeek—being a portal—should open its scope. Showing social media indicates that internal communication is supporting the work the UN does that is visible from the outside.”

- **Expand your reach by responding to unexpected situations.** “Two unfortunate crises have played an important role in iSeek’s development and its recognition by staff and management as an important tool: Hurricane Sandy and the earthquake in Haiti. While the intranet was not originally instituted as an emergency response tool, when Hurricane Sandy hit in 2012, iSeek played a key role in informing staff about closures and developments at HQ.

“With the Drupal content management system, emergency information is included in the top menus and emergency messages can be posted at the top of the homepage. The fact that iSeek also manages the posting of broadcast emails has placed it in a central role to disseminate information. The importance of these features on iSeek was illustrated during the Haiti earthquake.”

- **Haiti earthquake:** In 2010, when a 7.0 magnitude earthquake hit Haiti, the UN lost more than 100 staff in a single moment and the iSeek Team stepped in as an emergency hub. Editors from offices around the world were put to work to honor staff whose lives were lost while serving in a peacekeeping mission.

The design of the homepage was turned from blue to black and grey, and the team dedicated an important part of its editorial efforts toward researching and drafting obituaries, which were posted daily for more than a month on the intranet.

This brought people together and reminded staff of the role that their intranet could play in giving them a sense of belonging in the face of tragedy.

Best Practices

Content

- **Allow for distributed content ownership.** “Allowing for content autonomy over individual areas helps generate pride and create community amongst contributors. iSeek provides the platform and governance, and then news and stories originate from all over the world, enabling fresh and interesting content to be generated daily.”
- **Make it personal.** “Like a standard intranet, iSeek provides tools and systems at users’ fingertips, but iSeek’s human-centered content provides staff with a sense of meaning and belonging. By featuring a mix of global and local personal stories, along with the accompanying images and videos, the intranet serves to connect people and provide a window into the human aspects of this distributed organization. With some staff working in harsh or extreme environments, the platform unifies staff under a shared mission.”

Personalization & Customization

- **Let users see themselves in the experience.** “People want to see themselves in their intranet. As iSeek integrated more and more offices, it increased the visibility of these offices in the navigation as a way to remind users that they’re part of a global organization.”

Management

- **Move from a product-orientation to service-orientation.** “When iSeek first launched, the team was almost entirely responsible for creating and sourcing stories. Now, stories are created and submitted through a more distributed model and iSeek is being used to shift toward having an active role in building awareness, oversight, maintaining guidelines, and providing training and education. The platform has been transformed into more of a two-way communication tool.”

- **Stay lean.** “The iSeek team’s flat hierarchy and ability to reach out within the UN has enabled it to move fast and innovate.”
- **Take risks.** “The manager of the iSeek team displayed this in her office for years: ‘Please make mistakes.’ It’s good advice. If you don’t try and fail sometimes, then you have not taken any risks.”

Technology & Integration

- **Practice iterative development.** “Integrating new features every month and tweaking the design progressively has allowed the team to not have to wait for a big splash to improve the platform.”
- **Scale as needed.** “A single intranet in a large organization can only function if it’s able to respond to the multiplicity of user needs and serve many purposes. This mantra has served the organization well, particularly in response to scaling content localization in its role in publishing official and informal news and acting as a content repository, and also in some of its best features, including: the planning calendar, the business card generator, emergency information dissemination, and the pragmatic service of classified ads.”

Support & Help

- **Responsiveness yields trust.** “The iSeek team responds quickly to questions and helps with publishing and translating. They also play a big role in negotiating with constituents when content will appear, especially given sensitive information, priorities of senior management, and multiple time zones.”
- **Provide frequent training opportunities.** “If you train editors and users, they then act as ambassadors for the service.”

Users & Stakeholder Involvement

- **Cultivate and maintain an active network.** “iSeek has an active Focal Point network [of content managers] covering all departments, service units, and duty stations. Due to the limitations of a six-person team in a single location managing a global intranet, it’s important to leverage Focal Points to become champions across departments and geographies.”

Wellcome Trust (2020)

OVERVIEW

COMPANY

Wellcome Trust exists to improve health by helping great ideas thrive. The company supports researchers, takes on big health challenges, and campaigns for better science. It helps everyone get involved with science and health research.

Headquarters: London, UK

Company locations: Wellcome has offices in London and Berlin

Locations where people use the intranet: Employees at all Wellcome locations use the intranet.

Annual revenue: N/A

THE INTRANET

Users: Trustnet serves just over 1,000 users who are based predominantly in the company's London office. The intranet is used to help employees find out what's happening across this diverse organization. It is also a place where employees can be heard and can contribute to the conversation about how the organization achieves its mission. Trustnet is a tool that helps colleagues connect and get things done.

Mobile approach: Responsive web design

Technology platform: Drupal

TEAM

Product team: A six-person in-house product team built and manages Trustnet: two developers (one back-end and one front-end), one full-time UX person; and a total of four half-time team members—a UI designer, a delivery manager, a product manager, and an editor.

Leadership: Chris Newstead, Head of Internal Communications; Alasdair Cowie-Fraser, Head of Digital; Katie Taylor, Head of UX; Lynsey Smyth, former Head of UX; John Baptiste-Kelly, Product Manager; Alice Berry, Content and Internal Engagement Lead

Design (Creative Services): Chloe Luxford, UX Designer; Dana Chan, UX Designer (former team member and key contributor); Eleanor Ratliff, UI Designer (former team member and key contributor); Elizabeth Baird, UI Designer (former team member and key contributor); Fahim Ali, UI Designer; Glenn Walker, UI Designer (former team member and key contributor); Julia Godinho, Delivery Manager (former team member); Kristine Nielsen, Delivery Manager

Development: Ewelina Skibinska, Front-End Developer; Annika Clarke, Back-End Developer; Neil Cameron, Back-end Developer (former team member and key contributor)

INTRANET TEAM



Team members shown here (left to right): Neil Cameron, Dana Chan, Annika Clarke, John Baptiste-Kelly, Julia Godinho, Eleanor Ratliff, and Ewelina Skibinska.

HIGHLIGHTS ABOUT THIS WINNER

Just as Wellcome Trust searches for ideas to improve global health and have a meaningful impact in the world, the company's intranet has a meaningful impact on employees. Trustnet lives up to its name as a platform that users trust to access key pieces of news about the organization's work and to carry out top tasks. This is no coincidence, as the in-house digital team responsible for building this custom intranet has a clear understanding of users' top tasks (lunch menu, people finding, staying informed, meeting rooms, and organizational structure) and the organization's mission. With a distinct focus on users throughout product development—from discovery-style research through to usability testing prototypes and beta-releases—the team develops new features that meet needs and improves on existing features.

- **Top tasks methodology:** Feature development and improvement measurements are driven by top user tasks and an understanding of organizational goals. This team carefully monitors performance in line with established KPIs.

- **Integration with applications:** Employees can achieve key tasks on Trustnet without leaving the intranet. Focusing on one of the site's main goals, provision, the intranet team integrated internal systems such as ServiceNow (automated ticketing), Office 365 (automated events creation in Outlook), and Concept (automated meeting information retrieval). Important tasks—such as booking meeting rooms and gym sessions, and finding directory-style information about colleagues—are done exclusively on the intranet through back-end integration with internal systems. Users benefit from accomplishing these key tasks quickly on a familiar interface.
- **Clean, aesthetically pleasing design:** Content is displayed cleanly by utilizing whitespace, as well as grid and card layouts, making this intranet easy to scan. A controlled, subdued color palette highlights content dividers and interactive elements, making content easy to find and read.
- **Customizable list of shortcuts:** Although content is easy to find on Trustnet, users can still save their most frequent tasks and pages to their *Shortcuts*, promoting efficient intranet use.
- **Responsive design:** The entire intranet is built to be responsive to the needs of users working on the move. All design work on the intranet is specified for five breakpoints—mobile, tablet-portrait, tablet-landscape, small laptop, and large monitor—which makes the intranet accessible to employees regardless of their location or preferred device.
- **High-performing site search:** Trustnet promotes the use of search to surface relevant content to users. Not only does the site search have an effective auto-suggestion feature—which has cut down visits to the search engine results page by 55%—but it also has a *Did you mean* feature, which ensures searches are successful, even when users make typographical errors.
- **Kudos feature:** This feature allows users to celebrate the work of others, while being reminded of Wellcome's key organizational principles. *Kudos* also supports one of the key goals of the design: community.
- **Simplified navigation around key tasks:** The global navigation is simplified into 3 areas: *Groups*, *Org Charts*, and *Working at Wellcome*, with an additional navigation item for *Shortcuts*, making it easy for users to find content.
- **Strong editorial presence and content strategy:** The Trustnet team operates a strong content taxonomy that supports relevant content-tagging for authors; it also regularly audits content, as well as archives and auto-deletes outdated content, which keeps the intranet relevant and up to date.

- **Platform for communication:** Context was a key design goal. This challenged designers to find ways to demonstrate how employees see Wellcome and understand its work across a diverse set of disciplines. News, group pages, and Kudos are just a few ways Trustnet gives employees context.

BACKGROUND

Wellcome Trust seeks out amazing ideas that improve global health and have a meaningful impact in the world. Its intranet is key to helping its employees map the company's progress toward that mission and to giving all company employees a forum to hear stories from staff about their work and their lives.

The Trustnet project was initiated three-and-a-half years ago and was the first project for the company's newly formed Digital Team. Trustnet replaced an out-of-date, content-heavy intranet that was widely disliked by users. The design was updated two years ago to align the site more closely with a revised Wellcome brand identity and has been improved iteratively since then.

The team has been able to shape the intranet into a product that is uniquely Wellcome and is constantly evolving and responding to the needs of an ambitious, mission-orientated workforce. Trustnet helps to remove the friction of using many systems, giving users more time to do meaningful work. It also contributes to community building, giving Wellcome's employees the sense that everyone is working together toward the same goal.

Goals

The intranet design explicitly meets the expressed needs of staff and is therefore something they actually love and enjoy using rather than something they endure as a necessary business tool. Trustnet delivers on three core themes: context, community, and provision. The platform's further goal is to deliver on three core users statements:

- *"I have a clear picture of Wellcome, how it fits together, and how we are achieving our vision."*
- *"I am connected to my colleagues, feel valued, appreciated, and heard."*
- *"I have what I need to be impactful in my role."*

Product aims/delivery



Pictured: The Wellcome Trust intranet was designed to deliver results based on three core themes: context, community, and provision.

Challenges

Many of the traditional challenges of a traditional intranet were avoided by treating Trustnet as product rather than a project. In doing so, adequate ongoing resources and an emphasis on continual user-led improvement were baked-in from the start. The biggest challenges have been integrating with other systems and the governance issues that predictably emerge when working on cross-department processes and workflows. Often, while the team is able to improve some things for users (especially with regard to the interface) it has been difficult to address underlying—and often more impactful—challenges in the process (as well as ownership of those processes). As much as the team is empowered to own the work of developing and improving the product, far greater benefits are often identified but prove impossible to realize. The hope is that the Wellcome culture will one day better accommodate an organization-wide understanding of user-led design, especially a service-led approach—but this is still very much an ongoing journey.

The Hub of the Digital Workplace

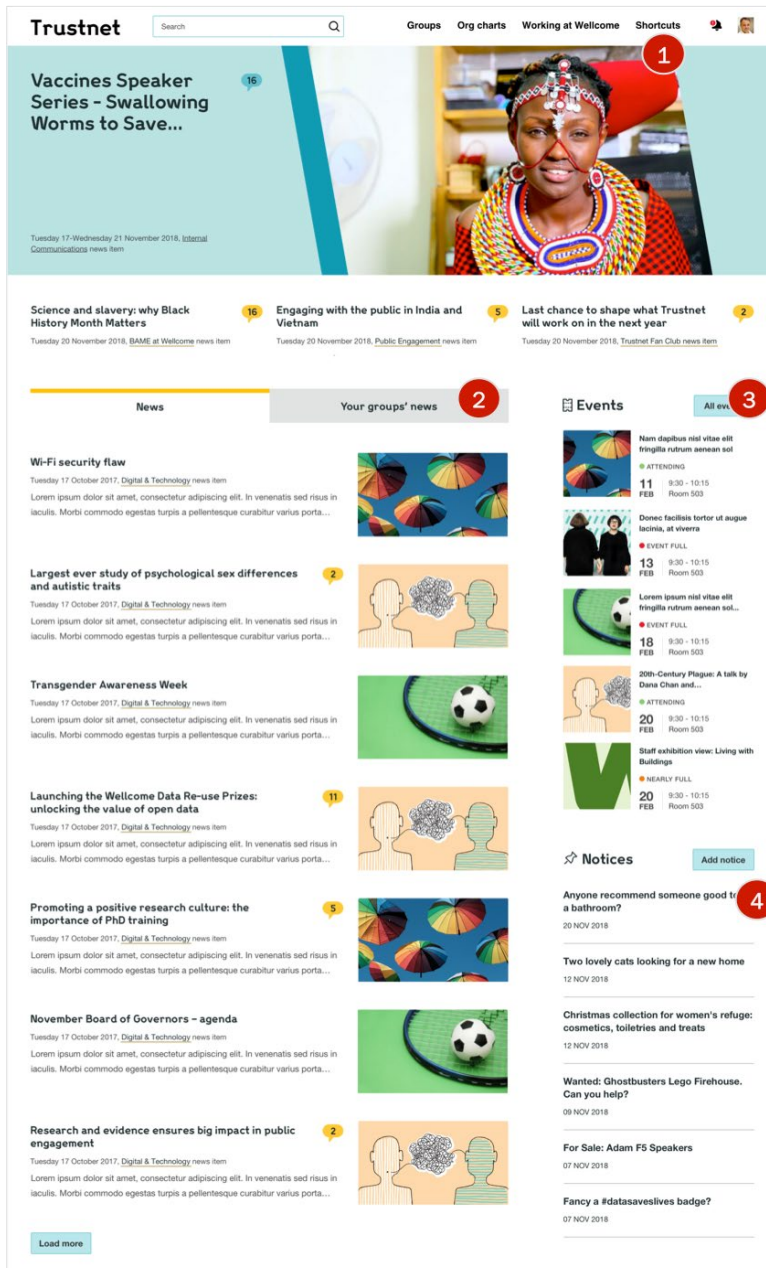
The aim was for Trustnet to be Wellcome's “operating system”: a consistent, familiar interface where employees can get things done. To deliver on that mission, the design team made sure the product integrates with as many internal systems as possible. For example, it has a user-editable shortcuts list, which is the primary way

to access HR, Finance, and IT support. The platform also features several other embedded integrations:

- **Meeting rooms:** Users can search for and book available rooms, and arrange catering, equipment, and visitor passes, all through Trustnet. The data for this functionality is synced with the company's internal booking system and replaces a form/email workflow, thus considerably reducing time and effort.
- **Events:** Trustnet events are integrated with Outlook, so when users sign up for events they appear in their calendar, and event updates are pushed out to all attendees automatically. This replaces a manual admin process for event organizers.
- **Gym booking:** Users can book gym appointments via the intranet, rather than using a separate app. This has radically increased gym usage for the organization and replaced a manual admin process.
- **Org charts and personal data:** Trustnet is integrated with the HR system, which provides the data for org charts and personal profiles, and automatically updates any changes to a user's details.
- **Forms and processes:** Trustnet has a purpose-built module that integrates forms with other internal systems to improve and automate workflows and processes. It currently integrates with ServiceNow, Light Blue (a photography booking system), and Filemaker to send requests via API rather than email, and it automatically creates tickets in these systems.
- **Elevator displays:** Trustnet integrates with the elevator displays to keep team location data up to date. It will soon allow authors to cross-publish event information to screens across the building.

DESIGN REVIEW

Homepage



Pictured: The Trustnet homepage is divided into four parts: the latest news feature promoted by the organization, all news (which can be toggled to show only news from the user's selected groups), events, and a noticeboard for more casual employee interactions.

Homepage Highlights

One of Wellcome Trust's aims is for the intranet to be a place where employees can find out about and share mission-focused work that is going on in the organization. The homepage is used as a communication tool to let employees know about recent news, work, and events. Although a lot of information is presented on the homepage, the content is prioritized so that news pieces produced by internal communications feature top and center, with further important news and events appearing below. Finally, a noticeboard feature below the fold allows users to post non-work-related messages to peers.

- 1. Simplified navigation:** The global navigation has been pared down to include only essential categories: *Groups*, where employees can read about and follow other teams or staff networks; *Org Charts*, which give an overview of the organizational structure; *Working at Wellcome*, which contains top resources for employees; and *Shortcuts*, which provides quick access to a customizable list of favorites. When new users are onboarded, they start with a standard set of favorites: *Menu*, *Policies Hub* (a link for a SharePoint document), *Useful numbers*, *Wellcome Benefits*, and *Workday*. The navigation options reflect Trustnet's core themes of context, community, and provision.
- 2. News:** Wellcome employees can see all news posted by others at the organization, as well as a feed of the news items from the groups they follow. The ability to tab between two different streams ensures that users can easily see news relevant to their direct interests, but not lose sight of the broader organization news. Callouts on the news articles increases engagement and promotes discussion.
- 3. Events:** The events panel shows upcoming events and a link to take users to the full events page. What's nice about this particular feature is the color-coding and labeling by each event, which indicate whether it is full, nearly full, or whether the user has already signed up for it.
- 4. Noticeboard:** This feature provides a place for more casual non-Wellcome related posts, such as the sale of some old speakers or a recommendation for a good carpenter. This is a nice addition to the intranet, as it ensures that non-work-related messages have a space and don't clutter other important information channels. Its location further down the homepage, however, downplays the feature's relative importance.



16

Vaccines Speaker Series - Swallowing Worms to Save Lives

Tuesday 17-Wednesday 21 November 2018, [Internal Communications](#) news item

Science and slavery: why Black History Month Matters

16

Tuesday 20 November 2018, [BAME at Wellcome](#) news item

Engaging with the public in India and Vietnam

5

Tuesday 20 November 2018, [Public Engagement](#) news item

Pictured: The Trustnet homepage is responsive. For users accessing Trustnet via mobile device, the latest news and events are promoted at the top of the page, the global navigation is collapsed in a hamburger menu icon, and search is still easily accessible through the search icon.

Meeting Room Finder

Trustnet

Q Search


Groups Org charts Working at Wellcome Shortcuts



Find a meeting room


Use search to find an available meeting room.

Alternatively, go straight to the form if you have already secured a departmental room and only require catering.

When? **1** Today  For how long? Please select How many attendees? Please select

Mon 11 Available: 3 Rooms Tues 12 3 Rooms Wed 13 3 Rooms **2** Thurs 14 14 Rooms Fri 15 3 Rooms Sat 16 Sun 17

3 6 Rooms available today for an hour seating a maximum of 23 people




554

Small fixed layout space and is an ideal for small meetings and presentations.

8

Request room




801

Fixed boardroom layout and is an ideal space for team meetings and presentations.

14

Request room




612

Fixed boardroom layout and is an ideal space for team meetings and presentations.

16

Request room




291

Corner room with a boardroom layout. Is an ideal space for team meetings and presentations.

16

Request room




G91

Street level room with windows onto Gower Street. Fixed layout.

16

Request room



611

Fixed boardroom layout and is an ideal space for team meetings and presentations.

16

Request room

Pictured: The meeting room finder is an intuitive tool that allows users to find available rooms and quickly assess their suitability.

Meeting Room Finder Highlights

This meeting room finder tool combines the pleasant experience of browsing a well-designed ecommerce site with the convenience of finding a suitable hotel room on a modern booking site. The card layout for available rooms makes scanning easy and presents a lot of valuable information in one space, without looking cluttered. The option to browse or give exact time and date caters to both types of user search behavior.

- 1. Search query filters:** When performing a meeting room search, the search filters remain visible and editable so users can quickly update the results.
- 2. Tabbing to explore future days:** Instead of adjusting the days and times to find further availability, users can easily tab between days, saving time and effort.
- 3. Availability clearly communicated:** The number and type of rooms are communicated at the top of the search results, as is the user's search criteria.
- 4. Visual highlighting of room types:** Employees booking a meeting room at Wellcome don't have to guess what the room looks like or go hunt them down. All information needed about each room is captured in a card. Photographs help employees assess whether a room will be suitable for the decorum of their meeting. Moreover, users can see the room availability throughout the day on the right side of each card, where yellow blocks indicate existing bookings.

Meeting Room Booking Form

Trustnet

Search

Group: Dig charts Working at Wellcome Shortcuts

Need to reset password?

Request a meeting room

Submit this form to request a meeting room, including catering and AV requirements. Please note that administrators will not initiate automatic confirmation – a member of the meetings team will be in touch.

Meeting details

Room details

1

Meeting room

554

554

Meeting date

09/05/2024

09/05/2024

Start time

14:00

14:00

End time

15:00

15:00

Meeting title

Meeting host

Number of attendees

Notes for the external Meetings team

Equipment

2

Do you need computer equipment or services?

☐ PC

☐ Display screen

Do you plan on using additional conferencing?

☐ Audio conferencing only

☐ Audio and video conferencing

Do you need meeting room equipment?

☐ Paper and pencils

☐ Flip charts

☐ Projector boards

☐ Goat milk

☐ Other...

Do you intend to ship items, either as part of a presentation or in the baggage?

☐ Yes

☐ No

Notes for the AV team

Visitors

2

Expected list of attendees or add individual guest information

Phone (UK, US & Internat)

Notes

Guest information

Name

Pick up instructions

Name

Pick up instructions

Send guest

Do you need name badges for introducing guests?

☐ Yes

☒ No

Notes for reception

Catering

2

Food...

☐ Catering

☐ Pre-ordered refreshments

Delivery requirements and notes for the catering team

A copy of this form will be sent to a senior trustee either as part of a report for retirement purposes, accessible only to the Trust's Data Protection Officer, or as a general update of records.

Submit

Pictured: Trustnet allows users to book a room, along with catering and equipment, and arrange for visitor badges, all in one well-designed form.

← Search for room availability

Request a meeting room

Submit this form to request a meeting room, including catering and AV requirements. Please note that submission does not indicate automatic confirmation - a member of the meetings team will be in touch.

Meeting details

Your details

[Edit details](#)

Meeting room

554

Meeting date *

2019-08-01

Start time *

Hour : 00

End time *

Hour : 00

Meeting title *

e.g. Workshop: How to make friends on the internet

Meeting host

Number of attendees *

Notes for the Internal Meetings team

If you have any other special requirements for your meeting room, write it here. e.g. recurring bookings

Equipment

No Yes

Visitors

No Yes

Catering

No Yes

A copy of this form will be sent to a secure mailbox where it will be kept for reference purposes, accessible only by the Trust's Data Protection Officer. It will be deleted after 12 months.

Submit

Pictured: Users can easily make a meeting room booking via their mobile device.

Meeting Room Booking Form Highlights

We love a well-designed form! This one from Wellcome Trust takes care of everything employees need when hosting a meeting. Using this form, employees can book a meeting room, request AV equipment or stationery needed for the meeting, request visitor badges for external guests, and even order catering or cafeteria lunch vouchers. No need to email, complete multiple forms, or file any paper documentation! All of this is made possible through integration with internal systems.

- 1. Essential information front-loaded:** For employees booking a straightforward internal meeting with no further needs, booking is easy as the important booking information is front-loaded. Personal details are pulled from the HR system, so no manual entry of contact details is required.
- 2. Additional requirements:** If users have additional requirements, they can fill in the three sections that follow. The additional sections can be toggled off by selecting *No* at the top of each section for users with a straightforward booking. This allows users to submit the form quickly.
- 3. Visual reminder of room availability:** While completing the form, users are reminded of the room number and availability on the target day, which avoids the need to retain such information in their short-term memory. Users can also see the other meetings that are happening around the meeting time they're looking for.

Profile

Trustnet

[Groups](#)[Org charts](#)[Working at Wellcome](#)[Shortcuts](#)

Product Manager Internal Systems Wellcome Trust

I am the product manager for Trustnet, working to improve the integration of internal systems for the People Platform.

Skills

[intranets](#), [Product Management](#), [Search](#)

1

My priority areas:

Followed

[Open Research](#)

[Priority Area: Mental Health](#)

[Priority Area: Diversity and Inclusion](#)

My groups:

3

Member

[Working parents and carers](#)

[SelectHR](#)

[Trustnet Fan Club](#)

[Digital & Technology](#)

[Together Science Can](#)

['Is it good?'](#)

[Artificial Intelligence and Big Data](#)

[Priority Area: Data for Science and Health \(Development phase\)](#)

[Abracadata](#)

[Wellcome digital](#)

[People](#)

[Data science & engineering](#)

[Investments](#)

Follower

[Internal Communications](#)

[Public Engagement](#)

[Communications](#)

[Learning and development](#)

[Wellies](#)

[Volunteering](#)

[MyCareer](#)

[Strategic Approach](#)

[Wellcome Exchange](#)

[Behavioural Insights](#)

[BAME at Wellcome](#)

[Culture & Society \(C&S\)](#)

Edit profile

Form submissions

[@wellcome.ac.uk](#)

Phone:

Mobile:

Skype:

2



Slack:

Twitter:

4

8th Floor by the pineapple

[↳ People](#)

[↳ People Services](#)

5

Manager:

6

Is this profile out of date?



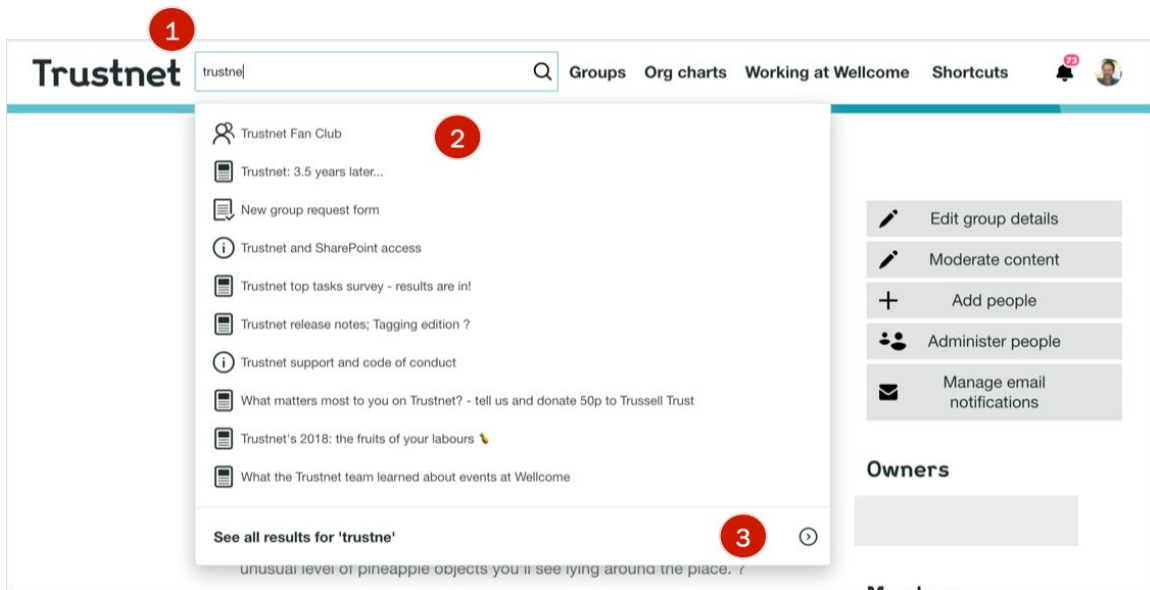
Pictured: Profiles on Trustnet are a place to find all needed information about colleagues.

Profile Highlights

Forget old, unusable HR directories. Trustnet provides each user with a profile that comes auto-populated with information, some from the company's HR system (name, job title, team, manager info) and some from Active Directory (email, mobile phone, Slack, Skype). This makes finding out about a group owner or news article author easy, and makes finding a specific person easy through a simple Trustnet search. Profiles are comprehensive, encouraging employees to learn more about their colleagues and the organization, in line with one of Wellcome's core themes for Trustnet: community.

- 1. Editable area to add skills and description:** Employees can add their own skills and a description of their work to their profile. This helps others understand what they work on and learn about their expertise. The company holds regular drives to encourage users to complete their profiles and, because the intranet is so widely used, employees are motivated to do so.
- 2. Contact details:** Contact details are pulled from an internal HR system, so they remain up to date. Users can select their preferred contact method (communicated through the star icon). A Slack integration shows whether users are currently online.
- 3. Groups:** Profiles include all of the groups that employees belong to or follow, which communicates their specific interests to others.
- 4. Location:** Users manually enter where they sit, which is a useful detail that promotes face-to-face interaction and is important for developing a strong community.
- 5. Management:** The profile shows manager and team details, which is helpful for understanding people and their place in the organization. This information is pulled from HR records.
- 6. Reporting out-of-date profiles:** Everyone hates an outdated profile. Users can report it if they believe something is inaccurate, allowing the profile owner or the intranet team to rectify the problem. When someone reports an outdated profile, the employee receives an email saying, "This person reported your profile to be out-of-date, can you take a look?"

Search



Pictured: Search is the preferred tool for finding relevant content on Trustnet, and the site search has a useful auto-suggestion feature.

Trustnet
Groups
Org charts
Working at Wellcome
Shortcuts

Would you like to search for "trustnet" on Sharepoint?

56 results for 'trustnet'

Filter results

All results (56)
People (23)
Forms (1)
Wellcome info (3)
Groups (1)
News (28)
Events (0)

Page results (33)

People (23)

Trustnet Fan Club
Group | 193 members
If you're as passionate as we are about Trustnet why not join us! What do you love? What do you hate? What would you like to see Trustnet do next?

Trustnet: 3.5 years later...
Friday 29 March 2019
News | [Wellcome digital](#)
A retrospective comparing the data of old Trustnet with our lovely new shiny version 3 and a half years after launch.

Trustnet and SharePoint access
Information | Internal Communications | Everyone
A note on who has access to Trustnet, who can access files stored on the Wellcome Trust's SharePoint, and the purpose of each.

Trustnet top tasks survey - results are in!
Wednesday 16 January 2019
News | [Trustnet Fan Club](#)
Trustnet ran a survey at the end of 2018 to find out what matters most to the people using Trustnet. Here are the results.

Trustnet release notes; Tagging edition ?
Thursday 30 August 2018
News | [Trustnet Fan Club](#)
Yesterday we released a new version of Trustnet which included the following: Editorial tags for News and Events, a "Related content" footer, Tags pages and more!

Trustnet support and code of conduct
Guidance | Internal Communications | Everyone
Your responsibilities when using our corporate intranet, and a list of organisations with access.

New group request form
Forms | Communications | Everyone
Complete this form to request a new group on Trustnet. You'll need to take ownership of that group - moderating news and events and managing membership.

What matters most to you on Trustnet? - tell us and donate 50p to Trussell Trust
Monday 5 November 2018
News | [Trustnet Fan Club](#)
Tell us what you care most about on Trustnet and help decide what we're going to work on in the next quarter. For every survey completed we will be donating 50p.

What happens at Pride... goes on Trustnet! 🌈🏳️‍🌈
Thursday 11 July 2019
News | [LGBTQ+ at Wellcome](#)
Take a photo journey showing Wellcome's pride march and Black Pride!

Trustnet's 2018: the fruits of your labours 🍌
Wednesday 9 January 2019
News | [Trustnet Fan Club](#)
What happened in 2018 on Trustnet? The stats and highlights from this year.

1
2
3
4

All people results

Pictured: Search results are well laid out by content type and present users with useful filter options.

Search Highlights

Early on in the design process, the decision was made to keep the site structure as simple as possible and to lean on search to surface content. As a result, a lot of work has been done to ensure high performance for Trustnet's search. The team regularly measures its effectiveness by benchmarking the top-100 terms and reviewing terms that yield no results. For key search terms, where user intent is clear, specific pages or content are boosted to continually improve the answers for commonly asked questions.

The notable auto-suggestion feature has reduced visits to the search engine results page by 55%, making searches more efficient for users, while a *Did you mean* function helps users quickly recover from typographical errors.

- 1. Search box:** Located in the left corner near the Trustnet logo, search replaces global navigation as the main device staff members use to access relevant content.
- 2. Auto-suggested options:** Relevant auto-suggestions appear as users type. Icons communicate the result type and whether it is a group, page, or form, providing greater information scent.
- 3. All results:** If the auto-suggested options aren't right, users can visit the search engine results page to see further search results. The team closely monitors search queries and, when user intent is clear, regularly promotes certain pages or content to continually improve the auto-suggested terms.
- 4. Page results:** Search results are well presented with pagination. Groups and the latest news articles are promoted to the top of the search results.
- 5. People results:** To avoid mixing people results and page results, people results related to the search term appear in a separate column, making it easy for users to narrow the search and focus on relevant results.
- 6. Filters:** The filters down the side communicate how many of each type of result is shown; they can also be used to narrow content if users are looking for content in a particular form.

Group Pages

Trustnet

[Search](#)
[Q groups](#)
[Org charts](#)
[Working at Wellcome](#)
[Shortcuts](#)

1

BAME at Wellcome

This group aims to champion and support black, Asian and people of other minority ethnicities in Wellcome. We are open to everybody in Wellcome and we want to:

Connect: To bring people together, creating a community and a safe space, where people can share thoughts and discuss ideas.





Support: To find ways to grow, develop and mobilise members of the community, and create solutions to helping Wellcome as a whole to be more inclusive.

Represent: To provide a voice for the community, championing their perspectives, and acting as a resource for the business.





Celebrate: To celebrate the diverse perspectives of the community, applauding their achievements.

We have a new steering committee for 2019. Here are the current working groups with their key areas of responsibility.


Our membership: This group will find out who's a member of the BAME Network and what they'd like to see us achieve:

- 
- 
- 
- 



Socials & Networking: Working group to lead on setting up, running & promoting regular socials:

- 
- 
- 
- 

Communications: Update changes via Trustnet.

- **(BAME network vice-Chair)**
- 
- **(BAME network Chair)**

General project management: Plan steering committee meetings, support the working groups, manage requests for BAME Network involvement or opportunities.

- 
- 

2

Events


Motherland - Movie Screening

Monday 11 April 2019

The Francis Crick Institute

3


News



BAME@Wellcome needs you! - 2019 Membership Survey

Tuesday 26 February 2019


Help us to be best understood, serve and meet the needs of our members and allies in 2019.



A big up to my BAME: February Edition

Tuesday 12 February 2019

A big up to the one and only Aisha Oba, whose she embarks onto her new role as Managing Director at Black Cultural Archives.






4

Join group




Follow group

5




Owners

Members


   **...**

Followers

   **...**

6

Find us on Slack:

 **Open Slack channel**

Recent forum activity:

Concert works of BME composers at Southbank

Updated 1 April 2019

Naguib Kheraj

Updated 1 April 2019

Trying to reverse African-Americans' distrust of medicine one blood donor at a time

Updated 28 March 2019

Photography for Smoke and Mirrors Exhibition

Updated 1 April 2019

Chinese American scientists, NIH express concern over prejudice

Updated 28 March 2019

Forum

7

Forum

Pictured: Group pages are designed to be a place to share work and engage in community discussion. This page from the BAME staff community publicizes BAME events and news and is a place for community-building through the forum and Slack.

Group Pages Highlights

Group pages—which are navigable from the main navigation—foster a sense of community at Wellcome. Everything about the group’s activity is available on the group page, including published articles and organized events. Group content is well structured, and employees can easily find out who to contact and how to get involved.

- 1. Presentation:** Static content is presented thoughtfully through the use of short paragraphs, bullets, and bolded words, making content easy to scan and digest. This thoughtful approach is typical on Trustnet as the team provides an editor who helps users shape their content.
- 2. Events:** Upcoming group events are automatically displayed on this page.
- 3. News:** Articles produced by the group are displayed at the bottom of the page. All content created via groups appears automatically.
- 4. Joining a group:** Trustnet makes it easy for employees to join work-related groups. Users can either become a member or follow the group to keep abreast of the group’s work by clicking simple buttons on the group pages; no emailing group admins required!
- 5. Group owners:** Should users have questions, all owners are listed on the group page, as are the group’s members and followers. Maybe someone you know is a member! And if you want to find out more about the owner, it’s easy to view the person’s profile.
- 6. Slack integration:** A link to a Slack channel allows employees to connect with other group members, post queries, and learn more about the group.
- 7. Forum:** A forum provides a more formal avenue to share thoughts and feedback with group members. The forum is intended for bite-sized content such as links. Forums are used widely for staff networks (such as BAME or the LGBTQ+ Group) but are used less elsewhere.

Events Calendar

Trustnet

GroupsOrg chartsWorking at WellcomeShortcuts

All events

Viewing 10 of 76 events

Sort byUpcoming events

Filters

My groups +

Attending +

Past +

Tomorrow

23 MAY

Technology Training

PowerPoint Bitesize: Animations and Transitions

10.00 - 10.45, 501

23 MAY

Priority Area: Research Ecosystems in Africa and Asia

Shifting the Centre of Gravity

12.00 - 13.00, Darwin 1

23 MAY

Science

Bridging across disciplines: experiences from...

12.30 - 13.30, Darwin 7

This week

24 MAY

5

Abracadata

Google Analytics Clinic

14.00 - 15.30, 8th floor kitchen

24 MAY

Reading Room

Drawing with Strangers

14.00, Reading Room

24 MAY

Reading Room

Herbal Histories and Reproductive Rights

18.00, Reading Room

28 MAY

Christians at work

Christians at Work - weekly meeting

12.30 - 13.30, Room 303

28 MAY

Collections and Research

Exploring Research: Voices of Democratic...

18.15 - 19.30, Viewing Room

29 MAY

Technology Training

Introduction to Excel

10.00 - 12.00, 501

29 MAY

Internal Communications

Staff Meeting - May 2019

14.00 - 15.00, 6th floor

Pictured: The events page lists all events that have been created. The default display is in order of upcoming, but users can filter and sort the results to find particular events that might be more in tune with their interests.

Events Calendar Highlights

Anyone at Wellcome can create an event to be displayed on Trustnet. Users can view all events in order of upcoming; however, they can also filter and sort events to discover ones that may be of particular interest to them.

- 1. Results:** The number of event results is visible at the top of the page.
- 2. Sorting:** A sort function is available. If users don't want to view events in order of upcoming, they can also sort by *Recently added*.
- 3. Filters:** Rather than throwing all imaginable filters in the left rail, Trustnet presents only three useful filter options: events you're attending, your group's events, or past events.
- 4. Ordering of events:** Events are listed in order of upcoming by default and nicely visually demarcated by *Tomorrow*, *This week*, and so on.
- 5. Scannable event card layout:** The events calendar takes on a calendar-style display. Each card contains information to help users to understand the topic, along with who is running the event and where and when it is taking place. A picture provides more context about the event type.

Events Pages

Trustnet

Search

Groups Org charts Working at Wellcome Shortcuts

Edit event

Clone this event

Attendees list

Priority Area: Research Ecosystems in Africa and Asia

Follow group

Event


Thursday 23 May 2019, 12.00-13.00

Darwin 1

Register for event

Shifting the Centre of Gravity

0 0 4



Dr. Tom Kariuki, Director of Programmes at The African Academy of Sciences (AAS) will speak on the topic of 'Shifting the Centre of Gravity'. He will explore what it actually means to shift decision making away from London to parts of the world most invested in these decision and how African-led research can tackle the challenges of climate change, global health and food security.

An internationally recognised immunologist, Dr. Kariuki leads the Alliance for Accelerating Excellence in Science in Africa and the AAS programmatic activities to accelerate world-class research, foster innovation and promote scientific leadership on the African continent.

Register on TrustNet or just show up!

Tags: [Africa](#) [Research Culture](#) [Research ecosystems](#) [Research environment](#) [Science](#)

Like event

Give kudos

4 1

Comment

B I

0 / 0 symbols; 1 words

Submit

Don't miss...

Update: ELT decisions on new ideas for the Reserve

News

Wellcome Staff Survey 2019: You've had your say - so...

News

Science Review: What we've been up to and what we've...

News

Four ways neuroscience is advancing mental health...

News

Don't miss your Workday People Manager training in June

News

Related news and events



Science

New funds to advance global health research in lower and middle-income countries

21 MAY 19 - We are launching a new funding partnership...



Policy

Research uptake: Lessons from Malawi and launching our Pilot Awards

13 MAR 19 - Find out the lessons from our second...



Internal Communications

Jeremy's fortnight: next phase for funding The India Alliance

01 APR 19 - A moment to celebrate and cherish, Spring

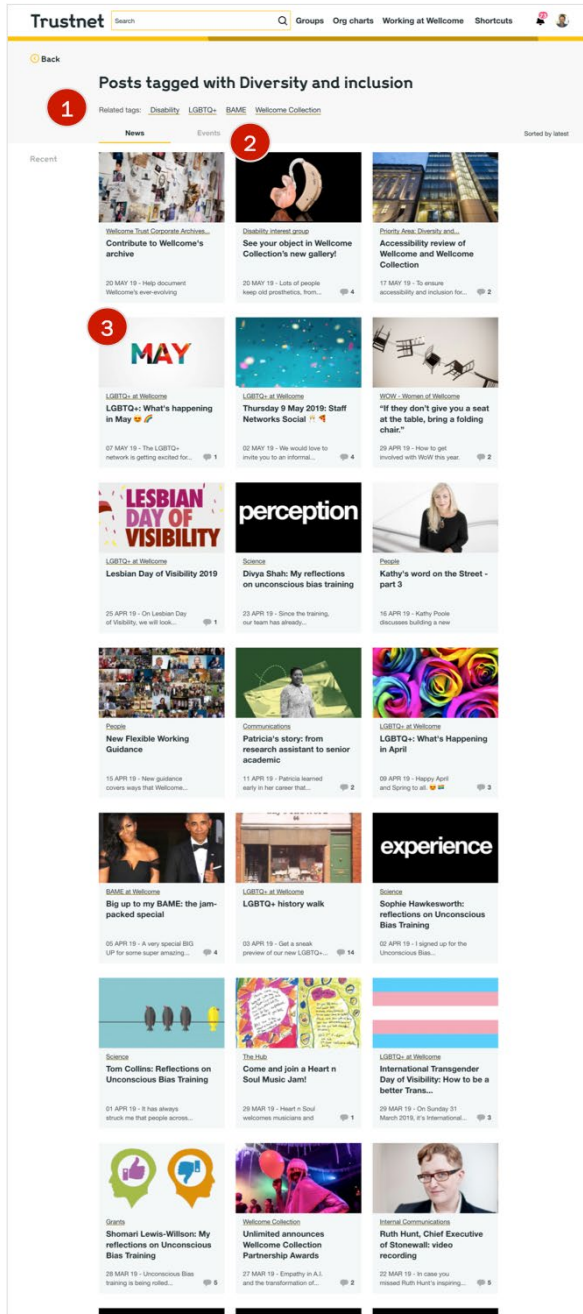
Pictured: Event pages provide a place for users to sign up for events and leave comments for event organizers. The pages also offer information about similar events and event-related news.

Event Pages Highlights

Event pages are a place for users to read more about an event and sign up, but they are also a place to give feedback to the organizers. Related events in the right sidebar and the footer promote engagement and onward journeys to explore similar content.

- 1. Register:** Trustnet events are integrated with Outlook. This means that when users register for an event by clicking the button on the event page, they automatically receive an Outlook calendar event as a reminder. Any event updates are then pushed out to all attendees automatically, replacing a manual admin process for event organizers.
- 2. Feedback:** Users can post comments, like, or give Kudos on the event page, helping to drum up interest in organized events, promote a sense of community, and build engagement.
- 3. Related content:** Trustnet event pages promote related content, both with the related upcoming events that appear in the right sidebar, and with the related events and news in the footer. This helps encourage onward journeys and increase engagement with Wellcome's content and events.

Tagging



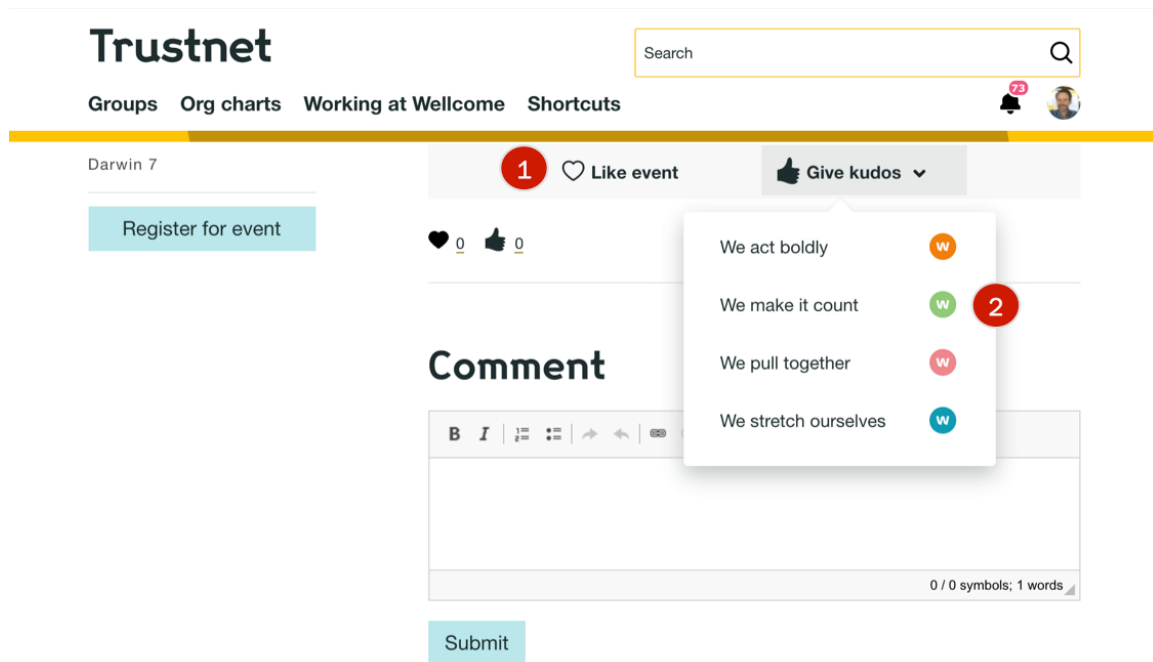
Pictured: The team at Wellcome responsible for building and managing the intranet also operates an efficient content taxonomy, which provides useful tags for both content editors and users. Users can search for content using tags on both events and news.

Tagging Highlights

Trustnet content is linked via a consistent, editorially managed content taxonomy. This helps create an overview of work being done in each area of interest and encourages content discovery for users.

- 1. Related tags:** Related tags in the content taxonomy are generated algorithmically and display when users filter content by a particular tag. This helps them discover more content that matches their interests.
- 2. Toggling between news and events:** Users can toggle between looking at tag-related news or events items, rather than receiving a confusing mix of the two.
- 3. Card layout:** News articles and events are laid out left-to-right, top-to-bottom in order of recency. Card layouts encourage browsing, as users can easily scan titles and images to see whether content interests them.

Kudos



Pictured: Users can congratulate their colleagues by giving Kudos to an article or event. Giving Kudos involves recognizing an individual or team for their work with respect to Wellcome’s principles.

Kudos Highlights

How do you encourage positive feedback and celebration of colleagues’ accomplishments as part of the organization’s wider mission? Trustnet has a nice feature developed as a result of user research: employees can give Kudos to a group or individual in response to a news article or an event. Sure, a thumbs-up isn’t anything new, but here, users who give the Kudos specify one of the Wellcome’s four values principles, keeping the Wellcome ethos at the heart of employee interactions.

- 1. Liking and giving Kudos:** When reacting to a colleague’s news article or event posting, employees have three options—comment, like, or give Kudos—which fosters a culture of feedback and shows appreciation for others.
- 2. Linking Kudos to organizational values:** When employees want to praise someone for their work or their team’s work, they can give Kudos and specify a particular Wellcome principle. This helps keep organizational principles current and relevant.

DESIGN PROCESS AND USABILITY WORK

A User-Led Design Approach

The Trustnet intranet is the result of a user-led design process. Wellcome has a dedicated team of UX and UI designers and developers who work to constantly improve the product in response to user and organizational needs. This means that the team spends a great deal of time working directly with users. The development process for new features typically lasts one to two months and includes discovery and research, user workshops, wireframing, and prototype building with the entire team before anything moves into development. This gives users a real sense of ownership over the product direction and also means that the team can build the site in a way that responds to very specific organizational needs.

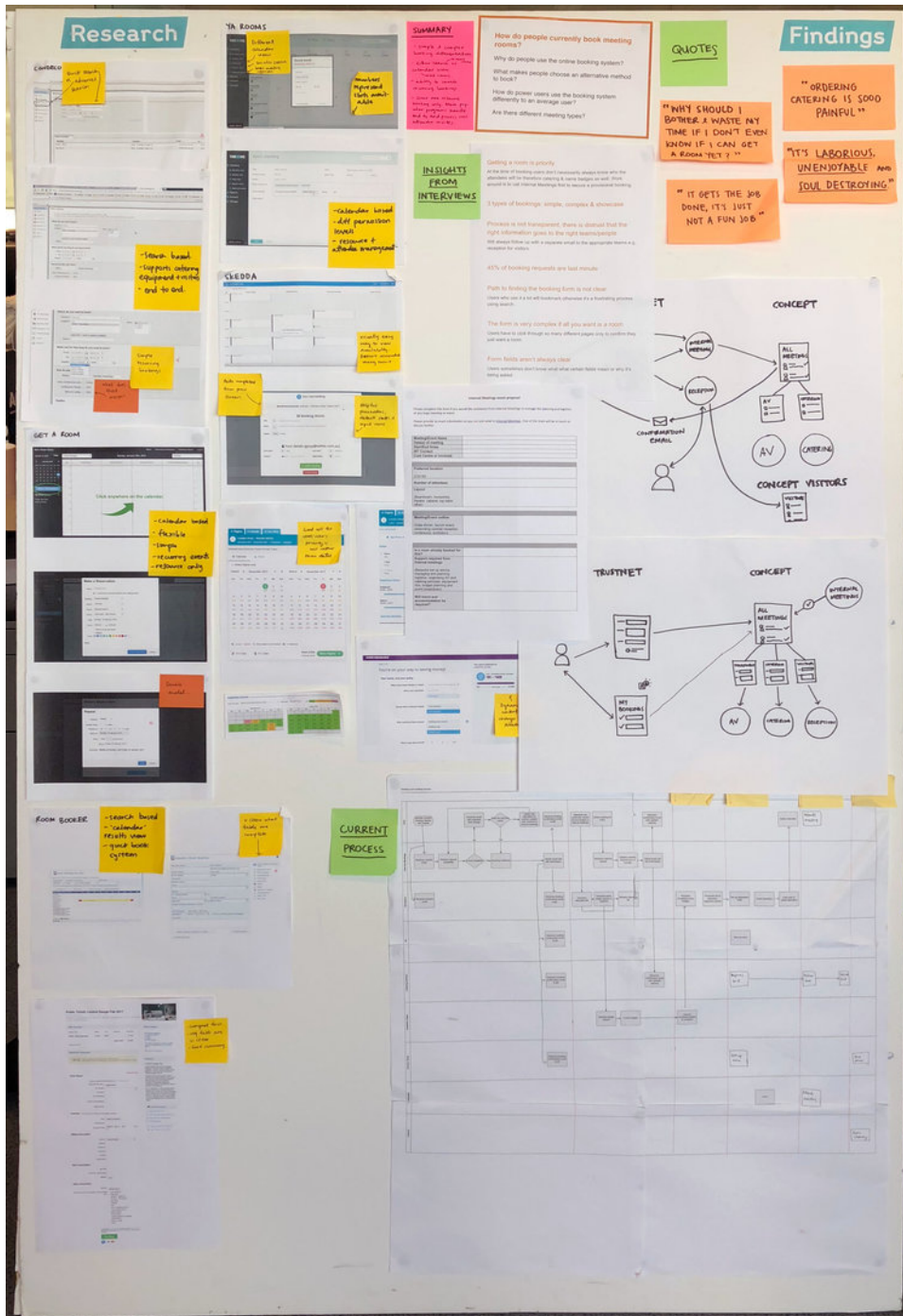
Designing for User Needs

Employing a variety of research methods helps the Trustnet team understand users' needs and the context of the problem they are trying to solve. The team's methodology plays out over a series of steps, with each one pulling users back into the loop again and again as the design evolves and moves toward a release. Those steps are as follows:

- **Discovery—figuring out what you don't know:** The first step in the team's design research process is discovery, which focuses on identifying the problem. The goal is to move from a general issue, such as "events," toward a deeper and more nuanced understanding of the issues different users might have with events. In this example, the team would try to frame the problem by considering the perspectives and challenges of event hosts and attendees. Interviews with a broad section of users and contextual inquiries during this phase help team members lock in on specific areas where they can have an impact. They then analyze and condense this work into key insights and distill the work into learnings for the entire team.
- **Competitive analysis:** The findings from the discovery phase are paired with competitive analysis data to determine how other products have remedied the same types of challenges. Most of this analysis leans toward customer-focused digital products, rather than other internal digital tools and systems. On one hand, this is simply a practical matter: internal tools are more difficult to see. But the team is also looking to gain knowledge from the tools it studies and the highest standards and innovation is typically achieved first in customer-facing products.
- **Develop problem statements:** Next, problem statements are generated and the entire team helps to map out potential solutions.
- **Sketching:** The next step involves sketching and ideation to explore possible solutions. This work involves users as much as possible throughout the process so the team can gather feedback and input.

- **Wireframes:** The sketches develop into wireframes through development team input. Then, onto final designs, which are also shown to users so the team can learn from their feedback and iterate the design. The team then turns the static wireframes into testable (clickable) versions that users can beta test before the final release.

Throughout the entire process, the team defines ways to measure impact and usability. When a problem statement is developed, the team tries to define metrics that relate to that specific problem: *What would success look like if this issue was solved?*



Pictured: This photo shows one of the team's research boards as it worked through the process of designing meeting room booking. It includes competitive analysis (under "Research") and a condensed summary of user interviews. It also shows sketches of how the meeting room software's integration might work and a process map of how it was working at the time.

Adoption/Buy-In

The most tangible benefit of a user-led approach is its impact on engagement. Put simply, if you build something people want (and have a role in defining) it is far easier to get them to use it. Trustnet has exceptionally high staff member engagement, due in part to the sense of ownership they feel in the product. Trustnet is at the center of how Wellcome sees itself as an organization and how users understand the work the company does across a diverse set of areas and disciplines. This kind of user engagement is easily quantifiable. Here are some examples:

- 98% of employees visit the site within any two-week period
- One average, users visit 43 pages/week and read eight news articles/week
- 40% of employees have posted an article within the last 12 months

This level of engagement allows the organization to communicate incredibly effectively. Difficult conversations are had out in the open; they are engaged with by senior leadership, and comments and feedback are encouraged.

Trustnet is the primary platform for sharing strategic goals, key events, and project updates for departments across the organization. As such, Trustnet has become organically embedded in organizational processes and communications. Teams, departments, and staff networks can leverage this engagement to build and develop community and share knowledge and insights.

There is also a strong emotional attachment to Trustnet, as demonstrated by the feedback the team regularly receives about how much the product is loved. Recent quotes from a staff survey, for example, include this ebullient praise:

- *"I'm still relatively new and have to say that Trustnet is fantastic, like nothing else I've ever used! [I] Appreciate how content is always being kept fresh and how easy & quick it is to find info."*
- *"It's always a pleasure seeing what's released in each version, the pace of innovation is refreshing."*
- *"I loooooove Trustnet. It's really easy to use. And pretty."*

GOVERNANCE

Shared Ownership

Trustnet sits within the Digital Department, which works in partnership with Internal Communication, the platform's primary stakeholders.

The product team is also accountable to a cross-department body that includes members of HR, IT, Finance, and Facilities, but it is autonomous in defining priorities. This cross-department body is responsible for aligning itself with broader organizational needs and for championing the user in discussions about how and why the product is further developed. This shared ownership structure has been vital to helping empower the team to execute impactful work for the organization.

INTRANET TEAM RESPONSIBILITIES	
Role	Responsibilities
Product Manager	<ul style="list-style-type: none"> • Define vision and product roadmap • Maintain stakeholder relationships and articulate vision and product roadmap to the organization • Prioritize work and help team understand context and direction of travel
Editor	<ul style="list-style-type: none"> • Drive site engagement • Ensure consistent tone of voice • Help Trustnet meet Internal Communication goals
UX Designer	<ul style="list-style-type: none"> • Understand and articulate user needs • Define the problem the team is solving • Ensure that the product meets user needs
UI Designer	<ul style="list-style-type: none"> • Design a consistent, beautiful, intuitive, and accessible interface
Front-end Developer	<ul style="list-style-type: none"> • Build a consistent, beautiful, intuitive, and accessible interface • Ensure that code is maintainable and performant
Back-end Developer	<ul style="list-style-type: none"> • Build things that meet user needs in a way that is maintainable, elegant, secure, and performant

URL AND ACCESS

ACCESS INFORMATION	
Item	Status
URL	https://trustnet.wellcome.ac.uk/
Default Status	The site is set as the default browser page for Windows users (approximately 70% of users)
Remote Access	The site is accessible to employees from anywhere to support the company's flexible working policy

TIMELINE

PROJECT MILESTONES	
Milestone Date	Milestone Description
September 2015	<ul style="list-style-type: none">Trustnet 2.0 launch
June 2017	<ul style="list-style-type: none">Redesign launch
February 2018	<ul style="list-style-type: none">Meeting rooms launch
June 2018	<ul style="list-style-type: none">Articles and events redesign launchKudos and Gym booking functionality launch
August 2018	<ul style="list-style-type: none">Slack integrationTaxonomy and emojis functionality launch
October 2018	<ul style="list-style-type: none">Events launchOffice 365 integration
January 2019	<ul style="list-style-type: none">Top tasks launchUsability benchmarking
March 2019	<ul style="list-style-type: none">Search improvements
Overall redesign timeframe: Ongoing	

CONTENT AND CONTENT CONTRIBUTORS

A Culture of Contribution

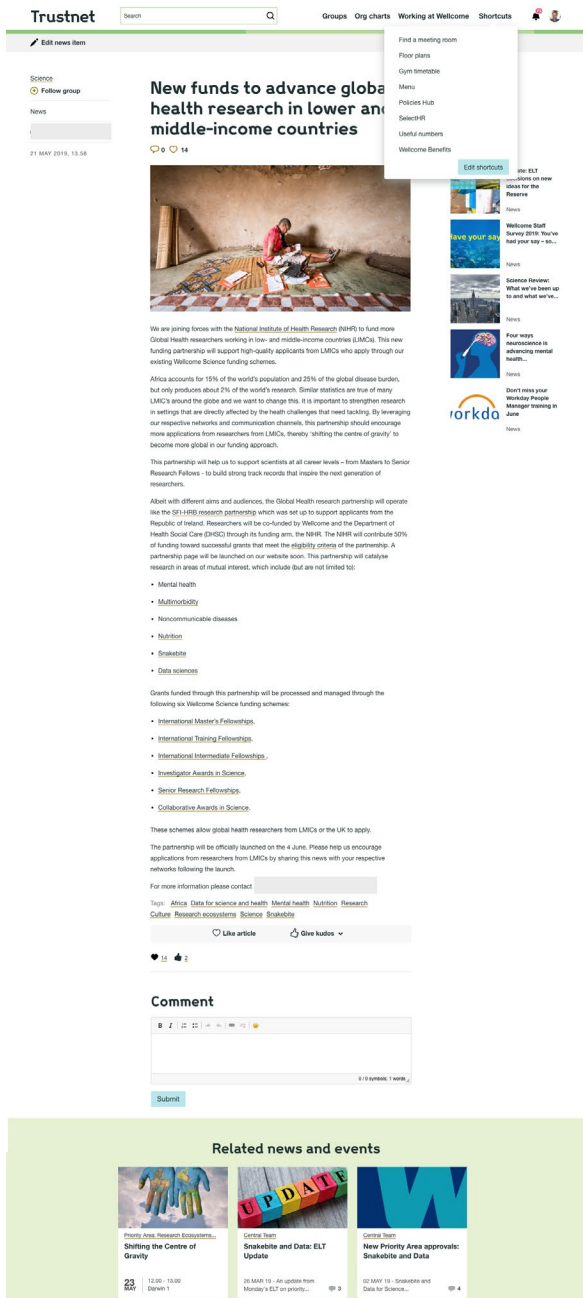
Given the nature of Trustnet as a channel for internal communication, it has become a default and essential component of the organization's way of working and a place for Wellcome employees to truly understand what the company is doing.

Departments, teams, groups (social and professional), and individuals are encouraged and expected to use the platform to talk about their work, and users are enthusiastic about publishing content. In 2018, for example, 40% of employees posted an article. Trustnet's editor encourages teams or departments with low engagement to contribute more, and is responsible for promoting content to the homepage and ensuring a consistent tone-of-voice for articles. With 1,800 articles

and events published each year, Trustnet is a dynamic environment with constantly changing content. This also helps drive engagement, as there are always new things to read and interact with.

Intranet Content Viewed as a Historical Repository

By default, all news and articles are deleted after 12 months, but content that is particularly interesting or important is kept on the site longer. Beyond that, the intranet team is currently in discussions with the archiving team to find ways to store these articles longer and provide a more granular, detailed history of the organization. The idea behind this effort is that such a repository would provide the ability for staff in 10, 20, 30, or even 100 years to be able look back at why decisions were made and how Wellcome has changed over time.



Pictured: The news pages have the same layout as events and are designed to be readable and meet accessibility guidelines. The page encourages user interaction via likes, Kudos, and commenting, and also propels users to onward journeys via the sidebar and footer. The sidebar displays the week's most important news or events. This screen also highlights the *Shortcuts* feature, which allows users to create quick links to key pages on Trustnet or any other key internal systems.

TECHNOLOGY

TECHNOLOGY	
Category	Technology Used
Web Server Hardware and Operating System	<ul style="list-style-type: none">• Debian Jessie 8• AWS Instances in the Cloud
Bug Tracking/Quality Assurance	<ul style="list-style-type: none">• Github
Design Tools	<ul style="list-style-type: none">• GA• Hotjar• Optimal Works• Sketch• InVision• Adobe CC• Browser Stack• Notion
Site Building Tools	<ul style="list-style-type: none">• Drupal/React: Used for both internal and external web projects; allows for consistent ways of working across different product teams and gives the teams enough flexibility to effectively respond to user and organizational needs.
Content Management Tools	<ul style="list-style-type: none">• Drupal
Search	<ul style="list-style-type: none">• Solr

MOBILE

All pages and features on the intranet are available on mobile and tablet. The site was built to be responsive to meet the needs of users who work while on the go.

All design work is specified for five breakpoints:

- Mobile
- Tablet
- Desktop-M (1024px)
- Desktop-L (1240px)
- Desktop-XL (1440px)

It was very important that Trustnet support employees working remotely and on mobile devices. The team therefore tested mobile designs and prototypes with users as part of the standard design workflow.

Currently, just under 20% of intranet traffic is from tablets and approximately 5% is from mobile devices. The vast majority of users are in the office, so the primary mobile use cases are for users trying to find more information about people, locations, and the lunch menu.

SEARCH

Trustnet uses Solr to power its search, as it is highly configurable and has a wide selection of plugins available. This technology helped the team create an effective search tool that allows users to find the things they need, but the team also views search as an ongoing refinement process. It therefore regularly measures search effectiveness by benchmarking the top-100 terms and the terms that yield no results. This process highlights areas that need improvement. One of the ways the team has improved search is to boost specific pages or content for key search terms where user intent is clear; doing so continually improves the answers for commonly asked questions.

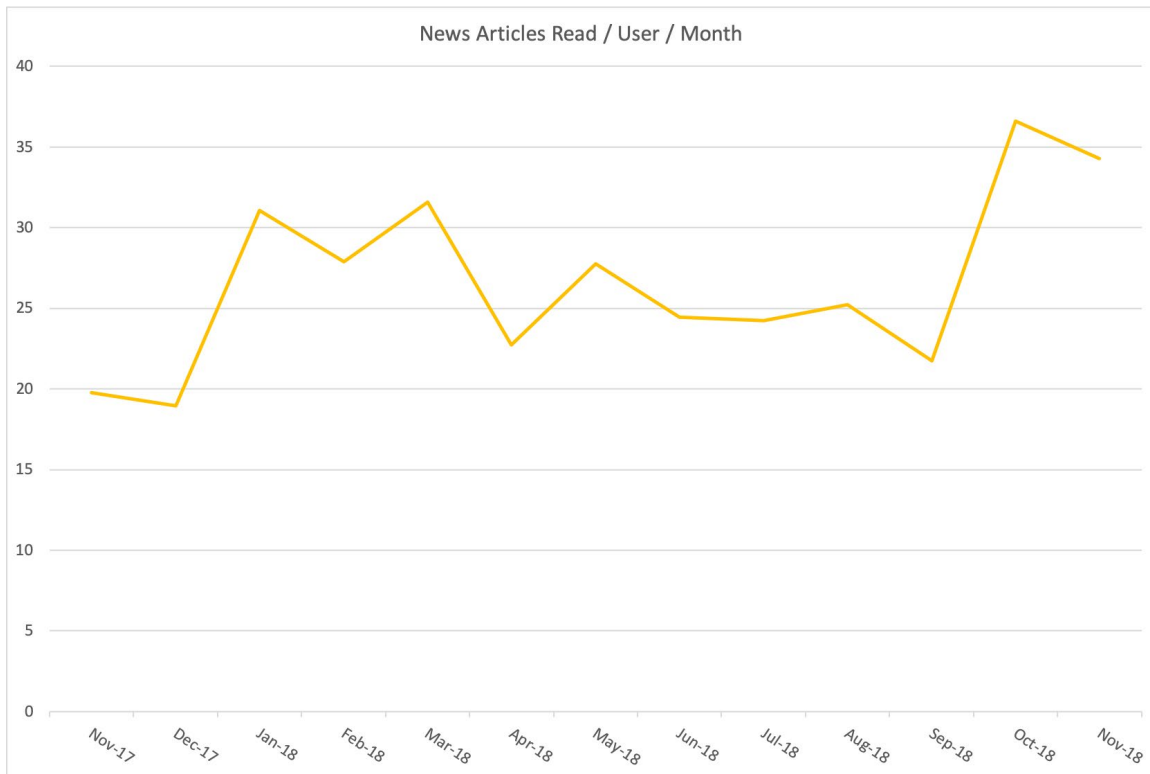
The biggest gains in terms of user satisfaction with search have come from adding functionality that suggests popular terms as-you-type. This work reduced visits to the search results page by 55% as content is surfaced within the search field itself. Adding, *Did you mean* functionality has also significantly decreased the no-results that occur with spelling mistakes.

ROI

Supporting Core Themes

As stated above, the intranet was built to support three core themes: context, community, and provision. The team measures the success of its work against how well those themes are supported by the platform.

For *context*, the team looks at how effective the product is at communicating what's happening in the organization. It does this by focusing specifically on the number of news articles that are read per month. During July 2019, 30–35 news articles were read per month, per user. This is a 40% year-over-year increase from the same period in 2018, after a similar increase in 2017.



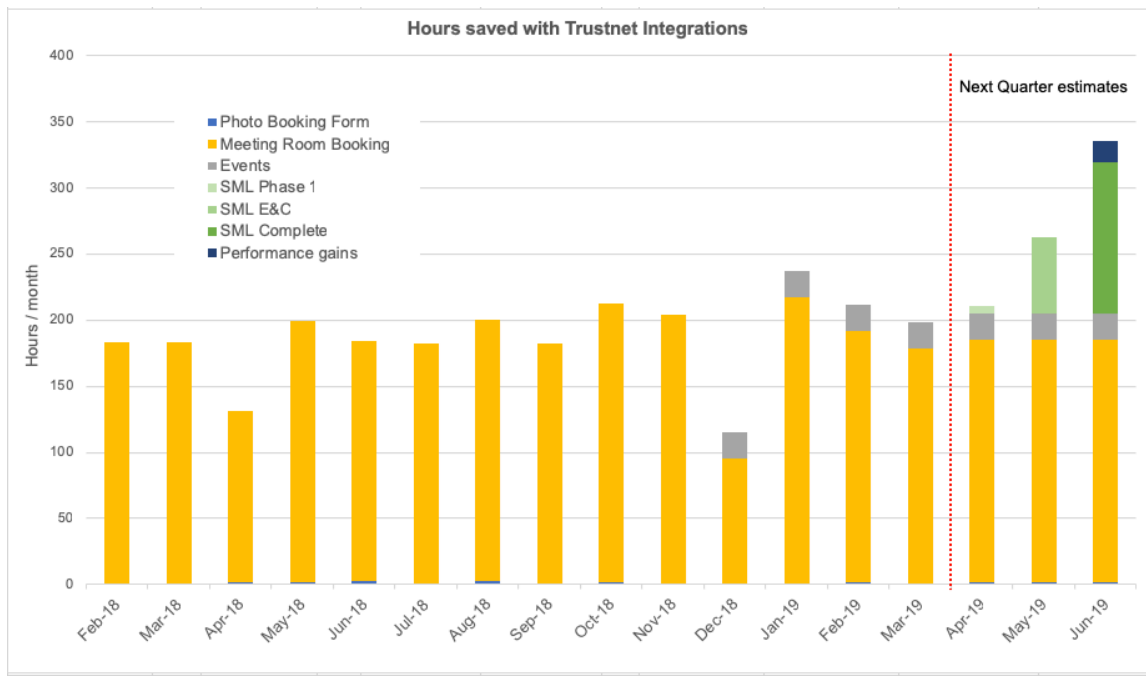
Pictured: The Wellcome team measures context success through news page views, which have increased consistently over time.

For *community*, the team looks at deeper levels of engagement, such as the number of groups that users follow or are members of, and the number of events that have been viewed. Examples of community success include:

- Users gave out a total of 18,070 likes and Kudos in 2018.
- In July 2019, 433 comments were posted.
- Unique page views for events content in 2018 increased by 45%, and time spent on the page increased by 30% in year-over-year measures from 2017 to 2018.

For *provision*, the team looks at stats that measure engagement with the *Working at Wellcome* section, search metrics, and the results of annual usability benchmarking. This helps them understand: *How easy/quick is it for a user to do x?*

- In 2018, the *Working at Wellcome* unique page views increased by 28% and the time spent on the page increased by 80%.
- For search, the average no-results returned were reduced by 55%.



Pictured: This graph displays efficiency savings from the team’s development by estimating time saved per task and multiplying that by the number of tasks per month.

Measuring Impact

Trustnet’s success is informed by the product’s vision statement and user goals. The product team measures the impact of its work against metrics, which (where possible) act as proxies for the type of outcomes it wants to achieve. These methods include:

- **OKRs:** The Trustnet team uses the Objective and Key Results (OKR) methodology to measure the impact of its work. The team set objectives and determined how to measure them for each quarter, and it communicated these outcomes to the wider organization. They have found that this metrics-based approach helps focus the team and create accountability; it is also a great tool to communicate value.

Staff survey: The team also sees the impact of its work in results from the company’s annual staff survey, where improvements in areas related to internal communication can be attributed to improvements in Trustnet. In the most recent staff survey, 92% of employees say they "have a clear understanding of Wellcome's mission" which is due in part to the work of the Trustnet team.

LESSONS LEARNED

In the build vs. buy debate, Wellcome Trust chose to build—and that decision has paid off handsomely for the organization. Despite the availability of incredibly mature intranet products, there are still compelling arguments for building and maintaining an internal product. And while this is true for internal products in general, it is

especially true for intranets. Following are some of what the Wellcome team learned by choosing the road not-often taken in the intranet world.

- **The trade-off for a relatively high upfront cost is engagement.** “When you build a thing people want, they are more likely to use it. This [custom-built product] isn't the aggregated wants of a thousand different organizations; it's the specific, tailored (ever-changing) wants of *your organization*. Rather than being a tool that people have to use it is a tool that helps and enhances an employee's day. On a more fundamental level, the intranet becomes an expression of how much the organization is listening to its employees and is a tangible expression of that dialogue.”
- **Momentum feeds on itself.** “Trustnet doesn't release features that don't work, because the team invests so much time listening to and responding to its users. The engagement and the momentum behind that engagement increase year over year as staff experience the value of using the intranet on a daily basis. For example, unique page views for Trustnet have increased 80% in the two years since the redesign, with largely static staff numbers. This provides an incredible platform for change and communication and understanding. It is hard to see how this could be entirely replicated with an off-the-shelf product.”
- **The risk is high, but so is the reward.** “The structure of the team, especially around an idea of product (and the Agile methodologies associated with that) create a sense of autonomy and empowerment for the team, which is incredibly motivating, particularly at an organization such as Wellcome. The content strategy, especially around devolving content to everyone, is risky and incredibly difficult to get right, but once in place changes the way an organization communicates with itself and helps create a sense that everyone's voice and contribution is important and valued.”

All of these in sum should be considered best practice and worth the upfront investment and risks inherent in building in-house.

Selection Criteria and Process

Nielsen Norman Group's Intranet Design Annual rewards great examples of useful, usable intranets that meet the needs of people using them. To find these intranets and their teams, we post a call for entries each year in May on our corporate website, www.nngroup.com.

To enter, organizations — either design firms responsible for the intranet or the organization's intranet team — can submit some background information about the organization, including a brief description of the intranet, its features, functions, users, and what makes it unique.

We review each entry, then judge and select the winners based on a four-step process:

1. Initial design reviews and numeric rankings
2. Follow-up questions with the top submissions (as necessary)
3. In-depth design reviews on the top entries to choose the top 10
4. Follow-up interviews with the top 10

Each step is detailed below.

INITIAL DESIGN REVIEWS AND NUMERIC RANKINGS

The judges (see next section, *About the Authors*) conduct baseline design reviews and narrow the field down to tier-one submissions. We rate each site numerically and note any great features or lacking qualities. We base the numeric rankings on criteria typically viewed as key to intranet usability, including some criteria that emerge from submissions or trends in previous years. We rate each submission on a scale of 0 to 3, with 3 being the best rating. Criteria include:

Navigation:

- Main navigation on every page
- Consistent, easy navigation
- Clear hierarchy
- Consistent style across the intranet
- Horizontal scrolling only where appropriate
- Expected page layout and appropriate vertical scrolling

Design:

- Pleasing aesthetics, clean design
- Page hierarchy and priority
- Brand support
- Engaging and helpful homepage design
- Good contrast between text and background
- Good use of graphics
- Legible text

- Distinguishable headings and links
- The right amount of text and links

Search:

- Consistently available search
- Relationship to employee search
- Good search design (ideally, a simple open field at the top of pages)

Personalization and News Delivery:

- Personalization and roles, catering to different offices or cultures
- Organization-related news
- Information about internal groups

Content:

- Well-written text
- Employee directory or directory search
- Content posting and editing capabilities for all employees
- Content management, content curation, editorial team management
- Business needs met

Overall:

- Simple forms
- Support for the main corporate functions
- Encapsulation of the organization's spirit
- Use of innovative, fun, or original features
- Accessibility
- Useful mobile offerings
- Originality or "something special"

FOLLOW-UP QUESTIONS WITH TOP TIER (WHEN NECESSARY)

We look at all the information submitted to us as part of the review process. Considerations of target users, tasks, and basic usability guidelines inform our scores and analysis. We review usability research findings, but we do not conduct usability evaluations with users of the intranets. Although we believe such evaluations are the best way to reveal what works (and doesn't) about a design, we conduct large-scale research studies based on testing that inform our expert reviews of the intranet submissions.¹

¹ *Intranet Usability Guidelines* report series is available for purchase:
<http://www.nngroup.com/reports/intranet/guidelines/>

After our reviews, we sometimes ask follow-up questions, such as for clarification or if a submission was missing information.

THOROUGH DESIGN REVIEW

After narrowing the initial submissions, we select the top 25 and complete more thorough reviews, narrowing the field to the 10 best.

FOLLOW-UP INTERVIEWS WITH TOP 10

We then notify the top 10 and make sure they have appropriate corporate approvals to share their designs and some content. We give them a series of follow-up questions about the site, team, and process in order to write the case studies for the report. We ask for detailed information about every part of the process, including design decisions, research and usability work, challenges faced, and lessons learned. We ask all teams the same core questions and ask detailed questions about specific aspects of each design as well.

Examples of some of the questions we asked teams include:

- How did the intranet start?
- How many people comprise the intranet staff?
- How is the intranet governed?
- What are the goals of the intranet and redesign project?
- What were your project's main UX research and design methods?
- How did you derive your IA, and search?
- What were your milestones and how well were they met?
- What makes your intranet unique?
- What advice would you offer to other intranet designers?

About the Authors

In addition to those listed below, we thank co-author Mathew Schwartz (penandcamera.com) (2004-2007 Intranet Design Annuals) for his essential work.

Kara Pernice is Senior Vice President at Nielsen Norman Group and works with clients to derive UX strategy and designs that meet business goals. With more than 20 years of experience in management and user experience (UX) research and design, she has led many major intercontinental research studies, authored a variety of research reports and hundreds of guidelines, and coauthored the book *Eyetracking Web Usability*. *The Wall Street Journal* called Pernice an “intranet guru.” She has lectured around the world on a wide range of topics, and her client work spans many businesses and industries. Before joining NN/g, Pernice gained invaluable experience pioneering UX and building and managing UX teams in an assortment of development environments and established several successful user experience programs. A champion for usability, Pernice chaired the Usability Professionals’ Association 2000 and 2001 conferences, and served as 2002 conference advisor. She holds an MBA from Northeastern University and a BA from Simmons College.

Amy Schade is a Director at Nielsen Norman Group with more than 20 years of experience in usability, user research, and website design and development. She has led research, authored reports, and taught courses on the usability of intranets, mobile websites and applications, responsive design, emerging design patterns, email newsletters, and ecommerce. She co-authored the Intranet Information Architecture report and has co-authored the Intranet Design Annual since 2010.

Schade works with clients large and small in industries including telecommunications, ecommerce, nonprofits, government, education, and publishing, including extensive work on corporate intranets. She has conducted worldwide user research, including longitudinal studies, remote studies, accessibility studies, and eyetracking research, running studies in the US, Canada, Europe, Asia, and Australia.

Before joining NN/g, Schade worked as an information architect. She previously held a variety of positions in advertising and web production. She holds a master’s degree from the Interactive Telecommunications Program at New York University and a BA in communications from the University of Pennsylvania.

Patty Caya (www.pattycaya.com) is a freelance journalist (writer and editor) and an award-winning digital media producer. In her business writing, she specializes in topics relating to usability (including social media and mobile design) and the business and technology of the web. She has co-authored the Intranet Design Annuals for NN/g since 2008. She wrote and edited the report, *Mobile Intranets and Enterprise Apps*, and the 1st and 2nd editions of *Social Features on Intranets: Case Studies of Enterprise 2.0*. She authored the 3rd, 4th, and 5th editions of the report on intranet portals and contributed to the *Application Design Showcase (2nd Edition)*.

For more than a decade, Caya has split her time between journalism projects and web consulting. She is an experienced content strategist and interaction designer. She has consulted for many of Boston’s top interactive agencies, leading web and intranet development projects as well as usability testing, research, and design initiatives. Her client roster spans a wide range of industries and includes leading national brands alongside mission-driven nonprofits. She has a BFA from New York

University's Tisch School of the Arts and has completed coursework in the User Experience Program at Bentley University.

Dr. Jakob Nielsen is a principal of Nielsen Norman Group. He is the founder of the "discount usability engineering" movement, which emphasizes fast and efficient methods for improving the quality of user interfaces. Nielsen, noted as "the world's leading expert on Web usability" by *U.S. News and World Report* and "the next best thing to a true time machine" by *USA Today*, is the author of the bestselling book *Designing Web Usability: The Practice of Simplicity* (2000), which has sold more than a quarter of a million copies in 22 languages. His other books include *Hypertext and Hypermedia* (1990), *Usability Engineering* (1993), *Usability Inspection Methods* (1994), *International User Interfaces* (1996), *Homepage Usability: 50 Websites Deconstructed* (2001), *Prioritizing Web Usability* (2006), *Eyetracking Web Usability* (2009), and *Mobile Usability* (2012). In 2013, Nielsen received the SIGCHI Lifetime Achievement Award for Human-Computer Interaction Practice. Nielsen's Alertbox column on web usability has been published on the internet since 1995 and currently has about 200,000 readers. From 1994 to 1998, Nielsen was a Sun Microsystems Distinguished Engineer. His previous affiliations include Bell Communications Research, the Technical University of Denmark, and the IBM User Interface Institute. He holds 79 US patents, mainly on ways of making the internet easier to use.

Anna Kaley is a User Experience Specialist at Nielsen Norman Group. Prior to joining NN/g, Anna worked for more than 10 years in user experience architecture, design, and digital strategy. She conducted complex user research, service, and experience design for healthcare, agriculture, finance, tourism, retail, nonprofit, and engineering clients. She also worked for a global, enterprise-level retailer where she was responsible for ecommerce and software as a service UX across B2C (business-to-consumer) and B2B (business-to-business) channels. Anna is skilled at applying insights from qualitative and quantitative research to drive conversion, increase revenue, and improve user satisfaction in digital products. She also has expertise in digital media planning, search marketing, and graphic design.

Anna held UX roles on both client-side product teams and in digital agencies of various sizes. She understands the challenges that user experience professionals face in both contexts. This familiarity helps her bring a well-rounded approach to her projects and instruction. She creates experiences that meet user and business needs while balancing technical pragmatism. Anna has a Bachelor of Journalism degree with an emphasis in Strategic Communication from the University of Missouri, Columbia. She is also a certified Professional Scrum Master.

Maria Rosala is a UX Specialist with Nielsen Norman Group. She plans and executes independent research for NN/g and leads UX training courses. Maria carried out usability testing on a variety of intranets at public and private organizations in North America and Europe for the 4th edition of the *Intranet Guidelines Report*. She is also an author of the 2020 and 2021 Intranet Design Annual.

Prior to joining Nielsen Norman Group, Maria worked as a UX researcher at The Home Office in the UK government, where she carried out research in the UK and internationally to improve numerous digital products and services, including internal casework systems, online visa applications, public-facing websites, and various other online and offline services. In late 2017, Maria led a UX team of researchers and designers in a high-profile program to deliver new digital services for use by millions of people in the UK.

Maria has a BSc from the Department of Philosophy, Logic and Scientific Method at the London School of Economics and Political Science, and an MSc in Human-Computer Interaction and ergonomics from University College London.

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