University of California Santa Cruz

INCEPTION PHASE REPORT | JULY 16, 2009

.rollingorange

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1.0 analysis & recommendations

The findings and recommendations in this report are based on the information we received from stakeholder discussions, online surveys, and team meetings balanced with our own experience in Web development and the higher education market.

key findings

Given the number and diversity of individuals in our survey group, a strong consensus was nonetheless apparent, identifying the importance of the Web presence, the main goals of the site, and its messaging:

- Everyone understands the increasing importance and value of the Web for gathering information and delivering tools and services (online applications, up-to date resource information, etc.)

- The most common singular goal expressed for the home page was to better promote a sense of place—the unique physical campus environment, and the energy and quality of education and research available at UC Santa Cruz

- There is a clear understanding that the home page audience is prospective students, faculty, and donors, while the rest of the home page environment is a portal to all University Web resources

The main area of disagreement is unsurprising. It concerns the issue of consistency—how deep does it go? How is it enforced? To this end, there is a slight majority that advocates for nearly complete consistency across the board, with a smaller but more vocal group believing that autonomy is important. Our belief is that the issue is more one of choice. Given a good set of site templates and an adequate tool set to help get sites live, most people are ready and willing to use them. There will always be those who prefer to go their own way, but if the design is appealing and the process is well presented and easy to adopt, we believe most will choose to "join the team." (One common theme we heard was that there is a lack of cohesiveness or sense of shared purpose and community that could be partially resolved through more consistent visual communications.)

Beyond the issue of consistency, the single biggest theme we heard was the need for a Content Management System. People are eager to be able to create, edit, and update their own information in a timely and efficient way. Current and relevant content crucial for both a first-time visitor's perception of the University, and to those who use the site every day. Given the choice between a beautiful static site and a plain but easily-edited site, we believe most people would choose the latter.

analysis & recommendations continued...

site-wide recommendations

- Focus the home page content and presentation towards prospective students, faculty, and donors
- Focus the second-level pages on providing pertinent and easily accessible information
- Use meta-navigation to tie together all UC Santa Cruz sites
- Visually unify university-wide sites (administration, library, profiles, calendar, index, visitor information, etc.)
- Define authoritative, centralized content sources to reduce duplicated or conflicting information (for instance, maps and visitor information)
- Design and develop a tiered home architecture structure so that key second level or College landing pages have the ability to develop a consistent yet customized look

presentation recommendations

- The new mantra is "show, don't tell"
- Illustrate the UC Santa Cruz messages through stories, articles, interviews or photos
- Use more high caliber, professional photography to present a unique sense of place
- Use video in key areas: to showcase the campus, to interview students & staff, to promote awe-inspiring research
- Simplify wherever possible—if it's "nice to have" then cut it; an editorial sensibility must impose itself over the internal pressure to present many voices and ideas

functional recommendations

The following are beyond the scope of our design, but should be kept top-of-mind:

- Implement the CMS as soon as possible
- Create a content workflow process to ensure consistent, efficient updates (see Operational Recommendations below)
- Implement a robust search engine that meets user expectations (basically, one that works like Google)
- Implement a campus-wide calendar and events system
- Implement a campus-wide map system with Google Maps
- Be prepared for more and more services to move online as user expectations rise

analysis & recommendations continued...

- Be prepared to integrate new technologies, especially in the realm of social media and networking (Facebook, Flickr, YouTube, Twitter, LinkedIn, iTunesU)
- Be prepared to tie into other forms of electronic communication (email newsletter, RSS, etc.)
- Be prepared to move information and services into the mobile space
- Consider outsourcing some technical aspects to free up ITS

operational recommendations

The University should set clear guidelines on home page environment ownership that dictate roles and responsibilities for site updates:

- University Relations should be primarily responsible for content featured on the home page with input from key constituencies (Admissions, Development, Faculty, and administration)

- University Relations should also be responsible for editorial content and stylistic treatment for the primary top-level landing pages linked from the home page

- University Relations should assign a Content Editor who manages feature stories and news items for the home page

- The Content Editor would be responsible for an editorial calendar with regularly-scheduled updates (monthly, bimonthly, quarterly, or other depending on content and resources)

- The site messaging recommendations presented in this report—along with Barry's brand recommendations and the Chancellor's key initiatives—should guide editorial decisions

- In addition to these regularly scheduled updates, the new home page environment should accommodate prominent emphasis of "breaking news" features when the need arises

2.0 current site assessment

The following are provided as a point of reference for current perceptions of the site.

what are the strengths of the current home page environment?

Most common answers:
- Clean, easy to navigate
- A-Z Index
- Top left navigation is easy to read

what are the weaknesses of the current home page environment?

Most common answers:
- No sense of place
- Stale photos
- Needs more powerful visuals that create a showcase
- It doesn't market the campus at all
- Interior pages look dated
- Doesn't communicate the excitement of the research that is going on
- Difficult to find/contact people

rolling orange conclusions about internal assessment

- The respondents tended to prefer simple, clean graphics
- There are clear concerns about ongoing maintenance with regard to functionality and usability
- There is a strong consensus regarding lack of messaging and positioning for the University
- There is some sensitivity to design, but much of the criticism we heard was related to content and function
- There is remarkable consistency in the assessment by internal audiences

rolling orange assessment of current site

Strengths:
- Lots of information
- Good content (stories and facts)
- Pages load quickly
- Fairly clear labeling and architecture

Weaknesses:
- Lots of information
- Very dense, text-heavy
- Not very visual
- Few student images
- Lots of jumps to other internal sites
- Little continuity between sites
- Not very much UC "voice"
- A lot you "can" do but not clear what you "should" do
- Hidden/downplayed multimedia

Suggested Improvements:
- Content should be streamlined—cleaner layout, less visible text per page
- Content should direct people to information instead of just presenting options
- Stories are good, but could be secondary and still be effective
- Add more visuals and multi-media

3.0 site purpose & goals

We'll use these goals to check our decisions about information architecture, layout, content, and functionality. Note that some of these goals are outside the scope of the home page environment but can be used in the future for further site development.

site purpose

The purpose of this site is to market the University and provide key information to the primary audience of prospective students, faculty, staff, and donors. The site also needs to be a portal and effective tool to access all University Web resources for existing audiences of students, faculty, staff, alumni, and the community.

organizational goals

- Present UC Santa Cruz as a high caliber UC opportunity, understanding that the Website is the most popular and accessible face of the University for all future students [Content/Design]
- Clearly highlight the research opportunities to increase reputation, thus attracting top students, faculty, and collaborators [Content/Design]
- Better promote graduate and undergraduate programs to attract and enroll the highest caliber students so that our programs will rank higher nationally [Content/Design]
- Actively manage the messaging to overcome myths about UC Santa Cruz [Content]
- Provide a way to easily update content with clearly understood roles, standards and policies [CMS]
- Develop a strong, consistent look, feel and ease of use for as many pages as possible [CMS]
- Provide a clear navigational structure and authoritative sources for content to reduce duplicate information and simplify site maintenance and design [Information Architecture/Design]
- Design a single events calendar system for the campus to meet student and faculty needs [CMS]
- Provide more relevant search results [CMS]

site purpose & goals continued...

individual stakeholder goals

- Provide self-service information and services through the Web to operate with less staffing resources [Out of Scope]
- Provide more on-line tools to standardize business practices and reduce the need for staff assistance [Out of Scope]
- Design for media like Flash and video for clear, concise and captivating communication [Design/Resources]
- Encourage online feedback to improve service delivery [CMS]
- Increase donations by 20% over the next 5 years because we do not receive sufficient funding from the state/system [Out of Scope]
- Implement Web technology for emergency situations because it has the potential to reach more people faster [Out of Scope]
- Consider an intranet for staff and faculty to remove the information of no value to external audiences [Out of Scope]
- Improve department page usability for students who use them to find information and make decisions [Out of Scope]
- Increase UC Santa Cruz Extension traffic that translates into a 10% increase in enrollments [Design/Usability]

long-term goals

Most common answers:

- A more dynamic site—content updated frequently [CMS]
- More stories about faculty and research [Content]
- Provide a unified approach to Web information and services campus-wide [CMS]

rolling orange conclusions

- There is general agreement as to what the site should accomplish, and which goals are most important
- Promoting academic quality and research to attract the highest caliber students and faculty is seen as the top priority
- Creating a simple, effective architecture that allows quick access to information is the next highest priority
- There is some disagreement about where to draw the line with "consistent look and feel" but most people prefer more of it campus-wide
- Getting the CMS running so that content creation can be put into users' hands is seen as critical to success

4.0 success metrics

In order to measure the success of the site, UC Santa Cruz will need to set baseline measurements for the these as soon as possible in order to have something to compare with in the future.

how will we measure success?

- Increased site traffic (generally 10–20% improvement over current stats) [Reputation/Usability]
- Increased donations 20% over the next 5 years [Content/Message]
- Fewer inquiries/reduced call volume [Usability]
- Improved compliance with records management, regulations and UC policy [CMS]
- The ability to gain constructive feedback [CMS]
- Frequency of updated pages [CMS]
- Fewer complaints about the campus Web presence by internal customers [Content/Usability]
- More applications by Undergraduates, Graduates, Faculty, Administrators [Reputation/Usability]
- Less broken links [CMS]
- More return visitors [Content/Usability]
- More people update records online [CMS]
- Better results when usability testing is done [Content/Usability]
- Reduced time to modify a unit's Web content [CMS]

5.0 site messaging
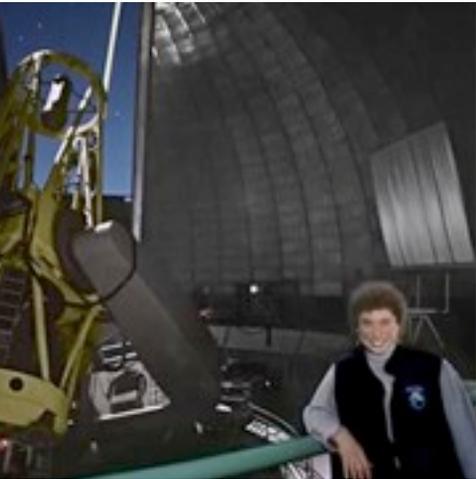
We'll use these messages as guidelines to check our decisions about information architecture, layout, content, and functionality. Note that these messages are not intended to be used explicitly, word-for-word—they are simply ideas that we need to express on the site. Keeping in mind the "show, don't tell" mantra, this may include interviews, stories, videos, charts, photo galleries or other interactive experiences. The idea is to convey the messages through the content of the site, not simply state them.

how we want to be perceived

Ranked in order of importance:
- Major research university that rivals any in UC System and many Ivy League institutions
- Rigorous academic environment in a unique world-class setting
- Inter-disciplinary approach attracting best-and-brightest academic staff
- Magnet school producing graduates who become stars and produce success stories
- Coveted school for undergrads offering an unusual opportunity for research
- National leaders in social and environmental progress
- Game-changing education for all students
- Spectacular natural campus
- Empathetic understanding of alternative points of view, striving for balance, wisdom
- Diverse, relevant to the region

site messaging continued...

competitive advantages

Most common answers:
- Academic excellence
- Dramatic natural environment
- Unique academic programs
- A different undergraduate experience
- Research opportunities
- Great grad programs

Other answers:
- Access to professors
- Unique outdoor activities
- One of the easier UCs to get into
- Location near Monterey Bay, Silicon Valley, and San Francisco
- Reputation for programs in social and environmental justice
- Small school setting with big school opportunities

core promise

We promise to make you proud of our pursuits and our people

Key facts behind promise:
- Academic Excellence
- Graduate Success
- Research Breakthroughs
- Interdisciplinary Studies
- Leaders in Social Policy
- Location

site messaging continued...

uc santa cruz...

- Is an uncommon place: transformational, provocative, and inspiring
- Is a major research university that rivals any in UC System and many Ivy League institutions
- Is a rigorous academic environment
- Attracts the best and brightest academic staff through an interdisciplinary approach
- Produces successful graduates in their fields
- Offers unique opportunities for undergraduate research
- Is a national leader in social and environmental progress
- Has a spectacular natural campus
- Strives for balance and wisdom in understanding of alternative points of view
- Is relevant to the region

uc santa cruz is also...

- Passionate about what they do
- Diverse in many dimensions: population, focus of studies, points of view
- Supportive of creativity and innovation
- Committed to making a real difference by providing effective solutions to real-world problems
- Involved in a surprising breadth and depth of research and education
- Supportive of you in realizing your dream of making the world a better place

rolling orange conclusions

- The primary purpose of the home page messaging should be to correct misperceptions about UC Santa Cruz and to start promoting the aspirational messages
- There is general agreement about the the ranking of those messages
- Stories, articles, videos, and facts that communicate academic excellence and world-class research should be the focus of the messaging in the home page environment, with other messages targeted to the various audiences at appropriate points

6.0 messaging support

We'll use the following as guidelines to check our decisions about information architecture, layout, content, and functionality.

elements of our identity that influence perceptions and decision-making

Ranked in order of importance:

1. Reputation
   - Major research university that rivals any in UC System and many Ivy League institutions
   - Rigorous academic environment in a world-class setting

2. Celebrity endorsement (famous alumni)
   - Magnet school producing graduates who become stars and success stories

3. User imagery (faculty, staff and students)
   - Interdisciplinary approach attracting best-and-brightest academic staff

4. Technical attributes (features)
   - Coveted school for undergrads offering unusual opportunity for research
   - Game-changing education for all students
   - Spectacular natural campus

5. Origin, history, tradition
   - Leaders in social and environmental progress
   - Empathetic understanding of alternative points of view, striving for balance, wisdom
   - Style (brand identity)
   - Clean, modern, focus on functionality over creativity

7. Event sponsorships & community relations
   - Diverse, relevant to the region

8. Price (affordable)
   - Not the most expensive, not the cheapest

messaging support continued...

9. Age
  • Appeal to incoming freshman through generations of alumni

10. Symbol (logo)
  • UC Santa Cruz seal and wordmark

What lends credibility and endorsement to our brand?
The following information can be used to support the brand messaging. It is included for reference only.

Most common answers:
  • Nobel Prizes, faculty visibility
  • Faculty awards and scholarship
  • Ground breaking research that impact lives, economy
  • Alumni with exceptional career paths
  • Word of mouth from current students, alumni, and other constituents

Other answers:
  • Socioeconomic and green leadership
  • Number of undergrads that go on to grad school
  • Rankings
  • Books and publications
  • Interesting student profiles and unique activities

7.0 site audiences

In order to create a simpler, more effective home page environment, we've broken down the audiences into primary and secondary. The main content of the home page itself will serve the primary audience, while information architecture and secondary content will serve the rest of the audiences.

primary audience for home page environment
- Prospective undergrads & parents
- Prospective grads
- Prospective faculty/staff
- Donors

secondary audience for home page environment
- Current undergrads
- Current grads
- Current faculty/staff
- Influencers
- Alumni/non-donors
- Local community
- Regional community
- Press

rolling orange conclusions
- There was general agreement and understanding (in principle at least) that the home page is geared to prospective audiences—focusing on these primary audiences will affect the home page hierarchy and editorial messaging decisions
- Secondary pages in the Home environment should support the main messaging and also work to help people find the information they are looking for
- Audience gateways can be created to support secondary audiences

8.0 audience needs & destinations

We'll use these needs and destinations as guidelines to check our decisions about information architecture, layout, content and functionality.

"Needs" are used to check content and be sure we are serving real user needs. Multiple sites or pages may serve one larger need. For example, "I want to know why I should choose UC Santa Cruz" may include facts about the University, research profiles, campus, student reviews, etc.

"Destinations" are used to check information architecture and cross-linking and make sure that users have access to relevant information. For example, graduate student destinations like the research programs may want to include "see also" links to faculty profiles, department home pages or admissions.

audience needs & destinations continued...

prospective undergrads / parents

Needs:
- "I want a university that fits me, teaches me what I need to succeed once I graduate, and that introduces me to great ideas and great friends"
- "I want to know why I should choose UC Santa Cruz"
- "I want to be able to picture myself at UC Santa Cruz"
- "I want to know how much it will cost"
- "I want to know what is required and how to apply"
- "I want help making good decisions"

Destinations:
- Admissions & UCOP Application Site
- Majors
- Colleges
- Departments
- Course Catalog & Program Requirements
- Registration Info
- Financial Aid
- Faculty & Student Profiles
- Housing Info & Student Life
- News & Events
- Campus Maps

current undergrads / parents

Needs:
- "I want a university that fits me, teaches me what I need to succeed once I graduate, and that introduces me to great ideas and great friends"
- "I want tools and services to support my education"
- "I want access to important information online"
- "I want to know what's going on around campus"
- "I want to be able to contribute to the community"

Destinations:
- MyUCSC
- News & Events
- Departmental Sites
- Faculty & Student Profiles
- Registrars
- Financial Aid
- Course Catalog & Schedule of Classes
- Library
- Learning Management System
- Regulations

audience needs & destinations continued...

prospective grads

Needs:
- "I want a university that helps me solve important research problems, contribute in a positive and meaningful way and establishes me in my field"
- "I want to know why I should choose UC Santa Cruz"
- "I want to be able to picture myself at UC Santa Cruz"
- "I want to know how much it will cost"
- "I want to know what is required and how to apply"
- "I want help making good decisions"

Destinations:
- Grad Division Home
- Graduate Program Areas
- Research Info
- Departmental Sites
- Faculty & Student Profiles
- Graduate Admissions
- Financial Aid
- News & Events
- Housing

current grads

Needs:
- "I want a university that helps me solve important research problems, contribute in a positive and meaningful way and establishes me in my field"
- "I want tools and services to support my research"
- "I want access to important information online"
- "I want to know what's going on around campus"
- "I want to be able to contribute to the community, both locally and globally"

Destinations:
- MyUCSC
- Graduate Program Areas
- Research Info
- Departmental Sites
- Faculty & Student Profiles
- News & Events
- Graduate Admissions
- Financial Aid
- Library
- Learning Management System
- Regulations
- Bookstore

prospective faculty & staff

Needs:
- "I want to be part of a well-respected academic community where I get the support, respect, and recognition that I need to do an outstanding job"
- "I want to know why I should choose UC Santa Cruz"
- "I want to be able to picture myself at UC Santa Cruz"
- "I want to know about salary & benefits"
- "I want to know what is required and how to apply"

Destinations:
- Employment Opportunities
- Salary, Benefits & Tenure
- Departmental/Divisional Pages
- Teaching/Research Info
- Faculty & Research Profiles
- News & Events
- Academic Calendar
- Parking & Transportation
- Housing, Regional Info & Cost of Living

current faculty & staff

Needs:
- "I want to be part of a well-respected academic community where I get the support, respect, and recognition that I need to do an outstanding job"
- "I want tools and services to support my research"
- "I want access to important information online"
- "I want to know what's going on around campus"
- "I want to be able to contribute to the community, both locally and globally"

Destinations:
- MyUCSC
- Campus Directory
- Faculty & Research Profiles
- Human Resources
- Registrar's Office
- Learning Management System
- AIS
- Departments & Divisions
- Academic Calendar
- News & Events
- Library
- Parking & Transportation

audience needs & destinations continued...

donors

Needs:
- "I want UC Santa Cruz to ask me to support something I care about that will have a lasting impact"
- "I want to know why I should help UC Santa Cruz"
- "I want to know how my contribution should be used"
- "I want to know where UC Santa Cruz needs help"
- "I want giving options that fit me"

Destinations:
- Giving
- Departments
- Programs
- News & Events
- Faculty & Student Profiles
- Research

alumni/non-donor needs

Needs:
- "I want to reconnect with UC Santa Cruz intellectually and with pride, based upon my experiences there plus my current passions, and I want to give back in a way that is meaningful to me"
- "I want reconnect with old friends and colleagues"
- "I want to support ___ at UC Santa Cruz"
- "I want to know what's going on at UC Santa Cruz"

Destinations:
- Alumni Info & Services
- Alumni Directory
- Alumni Events
- News & Events
- Colleges/Departments
- Faculty & Student Profiles

audience needs & destinations continued...

local community

Needs:
- "I want a university that doesn't degrade my quality of life, and I'd prefer if it actually enhanced it"
- "I want to know what the University has planned for the future"
- "I want to know the University can help me"
- "I want to see what events are happening at the University"

Destinations:
- Impact of Campus
- News & Events
- Campus Maps
- Parking & Transportation
- Opportunity To Participate (i.e. volunteering)
- Bookstore
- Dining Facilities
- Library

regional community

Needs:
- "I want a university partner that collaborates on innovative and creative research and that produces a robust stream of smart, mature well-equipped talent"
- "I want to know what the University has planned for the future"
- "I want to know the University can help me"
- "I want to see what events are happening at the University"

Destinations:
- Impact of Campus
- News & Events
- Campus Maps
- Parking & Transportation
- Opportunity To Participate (i.e. Internships)
- Bookstore
- Dining Facilities
- Library

audience needs & destinations continued...

influencers

Needs:
- "I want to be confident that my recommendation of UC Santa Cruz is the right one for this student, and will lead to a high quality and rigorous education in a safe and supportive environment that will provide the foundation for success in life"
- "I want to know why I should recommend UC Santa Cruz"
- "I want to know how the application process works and what's required

Destinations:
- Admissions & UCOP Application Site
- Majors
- Colleges
- Departments
- Course Catalog & Program Requirements
- Registration Info
- Financial Aid
- Faculty & Student Profiles
- News & Events
- Housing Info & Student Life
- Bookstore
- Campus Maps

press / media

Needs:
- "I want good stories I can tell on TV, radio, and in newspapers"
- "I want to find out who to contact for information or a quote"

Destinations:
- News & Events
- Department/Divisional News
- Review Magazine

9.0 appendix

staging site

Visit the UC Santa Cruz staging site for access to the following:
- Meeting Notes that summarize our conversations with key stakeholders
- Individual online surveys with the original responses

Sign-in:
- http://UC Santa Cruz.rollingorange.com/
- Username: ucsc
- Password: $lug09 (that's an L for SLUG after the $)