



# “Look and Feel” Policy and Standards

### PURPOSE:

The purpose of this policy document is to establish standard web site development requirements for Orange County (OC) agencies and departments. All County web sites should maintain a common look and feel and a common navigational framework. The goal of this policy and standards is to allow County constituents and employees to easily access information on any OC-developed web site. Additionally, they were developed to maintain an appropriate degree of consistency between web pages and web sites, while giving individual agencies and departments the flexibility they need to develop web sites and pages that serve a variety of purposes and audience.

In addition to outlining the business need and scope for developing the Look & Feel Policy and Standards for the eGovernment (eGov) initiative, this document also includes:

- ▶ Policy 1.0: Life Events Design
- ▶ Policy 1.1: Universal Dashboard
- ▶ Policy 1.2: Exemptions
- ▶ Policy 1.3: Agency Sub-Branding
- ▶ Policy 1.4: Accessibility for the Hearing Impaired

### BUSINESS NEEDS:

Electronic delivery provides excellent opportunities for the County of Orange’s customers to obtain information on County programs and services when and where they need it. Recognizing this, the Board of Supervisors has invested significant resources in its eGov initiative. In order for this initiative to be successful, it must balance the needs of diverse customers, individual Agencies/Departments, County management, and the Board of Supervisors.

eGov represents a fundamental shift in the way the County does business, and requires the County to reorient itself around the customer in order to be successful.

Customers are seeking:

- ▶ A single place to find information about County services.
- ▶ Easy-to-find information.
- ▶ A more “user-friendly” experience.
- ▶ More immediate and interactive communication.
- ▶ Information on County activities of State and National impact.

Given the massive amount of information online at County sites, a logical and consistent system of navigation, “look and feel”, and format is key to improving access. Effective navigation is dependent on consistent application of standards that are both visible and invisible to the end-user:

- ▶ Well-designed and strategically placed menu bars give users visual cues to site navigation.
- ▶ Search functions help simplify the task of locating specific information.
- ▶ Standardizing County site addresses will further enhance these elements.
- ▶ Integration with existing sites’ navigation schemas to create a coherent user experience.



Creating a “common look and feel” for an extended family of related web sites presents some enormous challenges:

- ▶ The programs and services offered by the County’s institutions are very diverse, and often serve a very specific purpose, for a very specific audience.
- ▶ County programs and services may extend beyond borders to reach a state national audience.

In some cases, Agencies and Departments have invested significant resources in building their online presence and brands, some of which are currently loosely tied to the County’s identity. Ultimately, the County seeks to:

- ▶ Present an integrated “face” to the public.
- ▶ Increase customer satisfaction with service delivery.
- ▶ Recover a return on the investment in e-Government.
- ▶ Present itself as a state and national leader in the use of technology in the public interest.

### SCOPE:

This policy extends to County entities, including:

- ▶ County Agencies
- ▶ County Departments
- ▶ County Programs
- ▶ Elected Officials
- ▶ County Boards & Commissions

It specifically excludes Special Districts, which have separate funding and reporting structures from other County entities. In addition, entities that have received an exemption through the process detailed in Policy 1.2, Exemptions, are by definition outside the scope of this policy.

### POLICY AND STANDARDS:

Given the need to balance multiple internal goals with the needs and wants of the County’s customers, the Look and Feel Policy & Standards are balanced to maintain an appropriate degree of consistency while giving individual institutions the flexibility they need to develop web sites and pages that serve a variety of purposes and audiences. This policy and standards for the look & feel of County web pages and web sites were designed to make County information more accessible and user friendly.

#### Policy 1.0: Life Events Design:

The County’s public portal was designed around customer needs and key “Life Events”, grouped into eight broad “Channels”, in order to make it easier for the public to find and conduct services online. A “Channel” is an intuitive, cross-Agency grouping of services that relate to a specific theme (i.e.; Health & Human Care).

A “Life Event” is an experience that triggers a customer to seek services from Orange County (i.e.; having a baby). This approach to navigation allows users unfamiliar with Agency or Department Agency and Department web sites directly.



When the user accesses content directly through the Agency/Department homepage, this content will be presented in the context of the Agency/Department-specific navigation. The user accesses content by clicking on a Channel link, the content will be presented in a Life Event context.

### A. Rationale:

A “Life Events”-driven navigation facilitates the access to information for users who are not experts on the web. For these users, the life-events navigation will enhance the user experience and reduce the number of clicks to find information.

An Agency/Department-specific navigation presents information within the context of that individual division’s business. For users who know what they are looking for and where to find it, the Agency/Department-specific navigation will be the preferred information architecture.

### B. Standards:

The County portal’s home page will be organized around “channels” that present the County’s services into meaningful groupings for the County’s customers.

## Policy 1.1: Universal Dashboard

All County web pages will include a common menu (“dashboard”), placed at the top of every web page, to facilitate ease of use by our customers.

### A. Rationale:

The use of a common dashboard carries the “Life Events” organization across all County web sites, and consistently locates key common functions, such as search, on all sites. In addition, the dashboard reinforces a County identity across all County services.

### B. Standards:

Prominently placed at the top of every public portal web page, buttons on the dashboard provide direct links to primary site features to facilitate navigation within and between multiple County sites.

### C. County Identity:

Orange County’s online identity should provide meaning to its customers and other interested parties who interact with the County and its services through its logo and tagline. A “tagline” articulates the essence of an organization and its goals in a few words. The County tagline unifies the diverse set of County services. The County tagline approved by the Board is *“Our Community, Our Commitment”*. **Note: The County identity (logo) will be determined by the Board of Supervisors.**

### D. “Channel” Navigation:

Channels present the County’s services into meaningful groupings for County customers. Through this concept, potential customers seeking services would not need to know or understand the County’s internal organization structure in order to access the information they are seeking.



### E. Global Search:

Search functionality includes the ability to search through the entire content across all County sites, using keywords. Results are presented to the user in order of relevance ranking to keywords.

### F. Shared Functions:

Shared functions enable customers to have a single consistent way of accessing the list of County Agencies and Departments, portal site map, and information about the County on every page, in addition to providing a common way to submit comments to the County.

### G. Registration and Log-in (Future):

The Registration and Login capability will be added in the future to allow users to login and receive a customized homepage based on their personal preferences. It will also facilitate the ability to join moderated discussion communities.

### H. County Seal:

The County Seal and name reinforces that the information and services that are accessible are "official".

## Policy 1.2: Exemptions:

An Agency or Department requesting an exemption from this policy should be ready to demonstrate an overriding public purpose or financial imperative, excluding sunk costs, which would warrant an exemption.

### A. Rationale:

The unique benefits of an exemption must outweigh the benefits of a common look and feel. For instance, some Agencies and Departments serve distinct audiences and customers who are averse to seeking information and interaction with Government.

### B. Standards:

The proposed exemptions process is as follows:

- ▶ An Agency or Department seeking exemption from the County's look and feel will direct its request to the County Executive Officer (CEO).
- ▶ The CEO will seek input from the County's Manager of Media and Community Relations and will make a determination.

## Policy 1.3: Agency Sub-Branding:

Individual Agencies and Departments will be able to sub-brand their sites, and provide Agency-specific navigation. Sub-branding means an Agency will be able to distinguish its own identity through a banner or logo underneath the global dashboard, and/or through a customized color scheme. General sub-branding principles include:

- ▶ "Brand hierarchy" should ensure that departmental brands are not emphasized over the main County identity, unless an exemption has been made as described above.



- ▶ Agency/Department navigation will include linking customers back to the County's shared portal navigation.
- ▶ The County's CEO/IT office will work with Departments and Agencies that have appropriate exemption to modify the design template as necessary.

**A. Rationale:**

Sub-branding preserves an Agency or Department's identity along with any investments they may have made while developing an online presence.

**B. Standards:**

Departments and Agencies will be provided templates for the development of their home and content pages. Departments and Agencies will "own" the content an identity of their individual pages, within the templates provided. Wherever possible, Agency-specific navigation will be modified to integrate with county portal navigation to maintain consistency throughout the site. This includes:

- ▶ Agency Navigation on Left
- ▶ Popular Links on Right