

State Affiliate's Guide:

WEB SITE MANAGEMENT



Developed by the American Society of Health-System Pharmacists in collaboration with edgimo Company, a Philadelphia-based Web design and consulting firm.



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Health-System Pharmacists®**

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Introduction

The World Wide Web has evolved into a powerful business tool for membership organizations. It is an easily accessible portal that is available 24-hours a day, 7-days a week with the capability to deliver key messages and provide valuable services. It facilitates the timely exchange of information and provides a convenient means for conducting commerce. The Web is a tool that gives membership organizations the power to accomplish more with less resources than ever before.

Most likely, your audience already has expectations of the organization's Web site. The Internet is playing an ever-increasing role in daily life, both at work and in the home. All the national pharmacy associations have developed Web sites that offer a variety of features and services, and in some States the State Board of Pharmacy requires that pharmacists renew their licenses via the Web. Those who use the Web have evolved too; their expectations are higher and they are less tolerant of pages that are "under construction" and "coming soon," content that is out of date, and features that do not function properly. As a result, an Affiliate's Web site plays a significant role in its

professional identity and has tremendous influence on the opinions and decisions of those with whom the Affiliate interacts.

Even without the pressure to have an effective Web presence, managing a Web site is a challenging part of State Affiliate business. Although most pharmacy professionals are proficient Web site users, the concepts and terminology associated with overall

management of a Web site are not well understood.

Fortunately, good Web site management requires skills that are second nature to pharmacists – gathering subjective and objective

information, assessing the available information and options, and creating a plan designed to reach a specific set of goals.

The purpose of this document is to review the principles germane to the management of a State Affiliate Web site and provide useful perspectives on issues you will face. Specifically, it focuses on developing a plan for a Web site, evaluating hosts, hiring Web Designers, and implementing a procedure for maintaining the Web site.

“Fortunately, good Web site management requires skills that are second nature to pharmacists . . .”

Creating a Web Site Plan

For those who are new to Web site management it is easy to initially focus on the interface design, the latest technology, the newest trends, and the addition of new features. However, the first step is to set goals and define your audience, and the second step is to determine the message the Web site will communicate and services it will provide. Once you complete both steps, you can establish a budget, evaluate hosting companies, begin the design, or redesign, process, and create a plan for maintaining the Web site. The result of this process is a Web Site Brief, which is a simple document that outlines the plan for the Web site.

When evaluating your hosting, Web design, and maintenance options, expect budget and time constraints to result in changes to the Web Site Brief (which is described later in this document). Don't be discouraged; this prospective decision-making process is intended to ensure that all the thinking and planning is done before entering the most expensive and time consuming parts of the process – essentially maximizing resources and productivity.

Setting Goals

The Web site is a business tool and it should be used with specific goals in mind. Goals should be prioritized from high to low based on the expectations of the audience and the mission of the State Affiliate. The goals of an Affiliate Web site might be to:

- ⦿ Increase member census by improving member retention and recruiting new members,
- ⦿ Improve the impact of Affiliate programs through increased member participation and involvement of the membership,
- ⦿ Enhance the quality of the pharmacy practice within a specific geographical region through education and information sharing,

- ⦿ Improve awareness of legislative issues and bring heightened visibility to the memberships' stance on health care policies and issues,
- ⦿ Generate revenue and sponsorships to further support the mission of the State Affiliate.

The Web and the expectations of those who use it evolve quickly. Therefore, the backbone of a State Affiliate's Web presence – the goals – should be reviewed for relevance at least annually.

Defining Your Audience

After defining the goals for the Web site, the next step is to define the needs and expectations of the target audience. The primary audience for most State Affiliates is its members and pharmacy professionals within a specified region and practice setting (i.e., potential members). Secondary audiences might include legislators, students, faculty, potential sponsors and advertisers, but in most cases these audiences benefit the most when the primary audience has been well served. Two main components define your target audience, the audience's expectations and technical profile.

Audience Expectations

An audience's expectations can be determined by reviewing meeting evaluations, from experiences in working and communicating with members, reviewing e-mails received via the Web site, and from membership surveys. There are a variety of online services (e.g., Survey Monkey, Zoomerang) that allow you to create a simple electronic survey, invite members to take the survey (i.e., by e-mail or the Web site), and then analyze the results. Surveys can capture valuable information about what the members want from the Web site and the relative priority of their expectations, but it is only one part of the picture.

To complete the picture, supplement this information with objective data from log file reports. Log files are found on your Web server and contain very detailed information about all activity on your Web site. The information is usually summarized and made available by the company that hosts the Web site. Log reports can show browsing patterns and traffic within the various sections of the Web site. In many cases, Affiliates find that the features members said that were high priority are not the features they use the most. Use the subjective and objective information to define what your audiences expects of the Web site so that you can determine the best way to allocate the available resources.

Technical Profile

The purpose of a technical profile is to ensure that the Web site is compatible with the technology used by the target audience. For example, if the graphical interface for the Web site is optimized for screen resolutions of 1024 pixels wide by 768 pixels high,

but the majority of your audience uses an 800 x 600 screen resolution, a good portion of the site will not be visible on the screen without scrolling. The technical profile of your audience should be shared with your Web design team to ensure that all features are compatible with technical profile of the users.

The technical profile of your audience can be approximated using national statistics, but Affiliates that already have a Web site should refer to the information contained within the log file reports. Technology changes fast; so it's important to look at recent data (e.g., last 6-12 months). When reviewing the data, look for the lowest common denominator among the majority of the users. It's fair to assume that those in the minority will likely upgrade in the future, so select a technical profile that serves the majority. Table 1 shows national statistics, and a reasonable technical profile for the audience described by the statistics.

Technical Profile of Internet Users		Example Technical Profile
Browsers	Screen Resolution	Browsers
44% Internet Explorer 6.0	49% 1024 x 768	Internet Explorer 6.0 or greater
20% Firefox 2.0	17% 1280 x1024	Firefox 1.5 or greater
19% Internet Explorer 7.0	10% 1280 x 800	
7% Firefox 1.5	8% 800 x 600	Operating System
2% Safari 2.0		Windows 2000 or greater
Operating System	Connection Speed	Screen Resolution
81% Windows XP	42% Cable Modem	1024 x 768 or higher
4% Mac OS	20% DSL line	
4% Windows Vista	16% T1 Line	Connection Speed
4% Windows 2000	4% Dial up	DSL Line or faster

Source: www.w3counter.com, accessed October 2007.

Content and Features

The next step is to identify the content and features that best suit the Web site goals and audience profile. Regardless of the size of the State Affiliate's staff and volunteers, or budget, expect there to be more ideas for content and features than can be supported with available resources. For example, an Affiliate might list its goals, and ideas for features and content as follows.

Goal: Increase Membership Census

- ⦿ Member Only area that provides access to directory of members
- ⦿ Ability to renew membership or become a member, and update personal information (e.g., address, phone) online
- ⦿ Promote local and statewide continuing education opportunities for members and allow them to register online
- ⦿ Provide access to continuing education opportunities (e.g., online or PDF documents) that meet state specific continuing education requirements
- ⦿ Ability for members to post advertisements for job openings at a reduced fee or for free

Goal: Increase Member Participation

- ⦿ Promote activities via the Web site and e-mail newsletters
- ⦿ Report regional news, regarding members promoted to new positions, achievements, and other news of interest to the membership
- ⦿ Provide content of specific interest to students, new practitioners, and technicians
- ⦿ Invite key members to post blog entries on issues relevant to pharmacy practice

Increase the Quality of Care

- ⦿ Promote participation in educational offerings via an e-mail newsletter and Web site
- ⦿ Invite key members to post blog entries on relevant issues, specifically those that share information likely to be useful for other practitioners

Any feature has the potential to be of value if managed properly and it is designed to serve the vision for the Web site. Before committing to a feature be sure to consider other sources for the same information or services that your audience might use (i.e., your competition), the budget required to implement and maintain each feature, and the features that are potentially displaced when another feature is selected. One of the advantage of being a State Affiliate is you can leverage features offered by the national associations, which might include news rooms, legislative updates, and discounts.

PLANNING TIP

Bookstores

An online bookstore makes sense if it clearly states that proceeds from sales benefit the State Affiliate, the prices are competitive with other sources (e.g., national associations, Amazon), and the volume of transactions support the cost required to offer the service. Affiliates can also take advantage of partnership opportunities with the American Society of Health-System Pharmacists (ASHP). ASHP offers a discount program for its publications that Affiliates can use as a benefit. Additionally, the Affiliate can receive a rebate for participating in the discount program (contact your affiliate relations liaison for more information). This offers members something they can't get from a competitor. However, bookstores that duplicate the services provided by competitors are likely displacing a more valuable feature.

At a minimum State Affiliates Web sites should include the following content and features. Table 2 lists other features that are commonly offered.

- ⦿ **About Us.** Communicates the mission and vision of the State Affiliate, identifies the officers, board members, and contributors, and provides other information that defines the existence of the Affiliate. For complex documents (e.g., charter) consider posting it as a PDF document, which can easily be printed and read, instead of incurring the costs of creating and maintaining an HTML version.
- ⦿ **Members.** Communicates the benefits of membership, and provides instructions on becoming a member or renewing a membership. If there are features to support it, include access to Member Only areas.
- ⦿ **Events and News.** A list of upcoming dates of interest, which might include social events, educational opportunities, legislative matters, and political dates. The News stories can be brief and link to additional pages that provide in-depth information.
- ⦿ **Contact Information.** State Affiliate phone, fax, e-mail, and mailing address.

Table 2. Common Content and Features
Member Only Area
Member Directory
Continuing Education Opportunities
Discussion Boards
Calendar of Events
Career Services
News
Online Commerce
E-mail newsletters
Useful Resources or Links
Site Search
Student, Technician, Resident Sections
Government Affairs or Advocacy

The goals and target audience will determine which features are right for the Affiliate’s Web site. Available resources will determine the relative priorities for implementation, and in many cases it is necessary to debut features over time.

PLANNING TIP

Lend a Hand

Anticipate member interests that suffer due to time restrictions – something members would do “if they only had the time,” and make it easier for them to accomplish it. For example, make it easy for members to contact their legislative representative or understand the key issues related to a political or legislative issue. List contact information for local political and governmental representatives and post a draft letter to a congressman for members to use. By removing barriers, members feel good about supporting the profession and the Affiliate engages the membership.

Below are additional thoughts to consider when planning features and content for a State Affiliate Web site.

Member-Only Content

By restricting access to key content, features, and services to members, there is added value to membership. Just exactly how this is implemented is highly dependent on the expectations of the members. One strategy is to allow non-members to clearly see the content, features, and services restricted to members, but when they try to access a member-only feature they are prompted to login or become a member. This approach is one way to promote the value of membership.

Another proven approach is to make common tasks more convenient for members. Ideally, a membership directory can be integrated with the system for managing user names and passwords so that those who use the site are only responsible for keeping track of one password.

Continuing Education Opportunities

Provides information about live, print, and online continuing education programs available to the pharmacy community. This feature is particularly useful in those States that require pharmacists to get continuing education on specific topics or from specific providers.

Career Center

A service that connects employers and prospective employees. Depending on how it is configured and the volume of traffic on a Web site, career centers can be a source of revenue and a member benefit. A career center can be as simple as job postings submitted via Web-base form, or a complex feature that allows users to create profiles and host an online resume.

In the past, career centers and “job boards” required custom development or expensive licensing fees, which made it difficult to generate enough revenue to cover the implementation costs. Today, there are ready-to-go third party applications that can be integrated into a State Affiliate Web site for a fee. Some third party applications can be set-up to use the look and feel of the Affiliate Web site, while others retain the branding of the third party. When considering a job board, investigate the offerings of existing services (e.g., Monster, Career Builder, and

CareerPharm) for your target audience to ensure that the State Affiliate’s feature offers something unique. Otherwise, it might make more sense to partner with or simply refer members (“link”) to an existing service.

Discussion Board

A service that allows visitors to post a comment or question to which other visitors can respond. There are a variety of third party software applications that can be integrated with a Web site. Some require that users register for a user name and password using the discussion board software, while others can be integrated with the Affiliate’s membership database. Members often prefer the latter because they only need one user name and password for the Affiliate Web site.

“Generally, discussions boards on pharmacy association Web sites receive little use . . .”

Before deciding to offer a discussion board, note that the value of discussion boards varies among audiences. In some niche markets discussion boards are used

frequently and therefore are a valuable source of information and support. However, in other markets they receive little attention even though a significant number of people indicated that they would use a discussion board. Generally, pharmacy association discussion boards receive little use even though pharmacists often consider them to be a good idea. The drop in popularity of discussion boards is most likely due to the ease of implementing blog and wiki software, and the more convenient “listserv,” which is available for free.

Listserv refers to a group of people subscribed to an e-mail list for the purpose of sharing information

among them. E-mails are sent to the entire group and those who are subscribed to the list can respond. The advantage of e-mail lists is that the discussion comes directly to the subscriber's e-mail box – they do not have to take the initiative to visit a discussion board. Some of the free service providers include Yahoo! Groups, MSN Groups, and Google Groups. In most cases, the Affiliate would form a group and then invite the members to join, which involves creating an account with the service provider.

A wiki is computer software that allows users to easily edit, create, and link Web pages. A wiki is often used to create collaborative content. For example, if a pharmacist finds an answer to a common question regarding the compatibility of new product he or she might post a wiki to share the information, and others might add to it. Overtime, the community creates a repository of pharmacy knowledge that is searchable. Wiki are an affordable and effective way to help with knowledge management. The disadvantage of a wiki is that the quality of the information is entirely dependent on the person posting it. There are no guarantees that the information is accurate and the burden is on the reader to determine if its appropriate for his or her use.

Blogs are similar to a wiki in that it is an easy way for users to share information with others by posting an entry to a Web site. Blogs are often opinion based versus a wiki that describes a process, or solution. In most cases other users can post responses to a blog entry, which makes it ideal to solicit feedback on legislative issues or other topics. Blog software automatically organizes and archives the information in searchable format, which eases the maintenance burden. The posts can be moderated, which allows a State Affiliate to control what is posted and by whom.

One of the advantages of blog software is that Web page layout is visually appealing and managed via a browser-based interface. In many cases, blog software is used to manage an entire Web site, or subsections of the site (e.g., calendar of events, news, job postings). Many hosts offer blog software as part of the hosting plan and can be easily added to an existing Web site and be used with your domain name, such as "www.affiliatename.org/clinicalblog" (Table 3). There are also Web sites on which you can create your own blog ("hosted blogs") and then link to it from your Web site.

TABLE 3. COMMON BLOG SOFTWARE

Self-Hosted (your domain name)

Word Press (www.wordpress.com)
Moveable Type (www.moveabletype.org)
Textpattern (www.textpattern.com)

Hosted Blogs (<http://yourblog.blogspot.com>)

Blogger (www.blogger.com)
TextPad (www.typepad.com)
Livejournal (www.livejournal.com)

Calendar of Events

This feature promotes upcoming events. In some cases, members are allowed to post events directly using a Web-based form. It's wise to limit the events listed to those that are relevant to the Affiliate Web site. Too many events dilutes the attention members give to the Affiliates programs, and can result in unnecessary maintenance work.

E-commerce

Most of the State Affiliate's members have probably registered for conferences, paid membership dues or subscriptions, and conducted other transactions online with national associations and other professional entities. Affiliates can expect that their membership would use the same services on their Web sites.

Most hosting companies offer some kind of merchant services that allow a State Affiliate to offer products and services for sale, and accommodate credit card transactions. The simplest e-commerce feature is to use a third party company to process the credit card transaction. These vendors usually process the transaction for the greater of a flat monthly fee or a percentage of the gross transactions, and in some cases both apply. Third party credit card processing companies are often a good solution for small businesses with a low volume of transactions, but often require that the Affiliate use the vendors branding on the pages used to conduct the credit card transactions. Also, the types of transactions allowed differs among vendors and should be clarified up front as some do not allow transactions for services (e.g., membership, conference registration). For some State Affiliates the volume of credit card transactions make it feasible to obtain a merchant account or use their existing merchant account to process online credit card transactions.

E-mail Newsletters

E-mail newsletters are an effective and inexpensive way to deliver messages to your audience and stimulate traffic to an Affiliate Web site. The key is to keep the newsletter short and timely, and not to send them too often. Use the opportunity to highlight key information of interest to readers and provide more information on the Affiliate Web site.

There are a variety of options for delivering e-mail newsletters. Some hosting companies offer e-mailing services, and there are several third party services to help you create and deliver e-mail newsletters. Pick a third party vendors or software package that will manage bounced messages and update the e-mail list, and allow people to subscribe to the list and remove themselves from the list. It is critical to ensure that the method for sending messages is consistent with good e-mail list practices to avoid being mistaken for a sender of spam. Major Internet service providers, such as AOL, Verizon, Earthlink, Comcast, as well as others, will block all mail from a source identified as a spammer, which is difficult and time consuming to resolve.

The cost is usually a function of number of subscribers to which messages are sent. Some commonly used vendors (e.g., iContact, MailChimp, Boomerang, Patron Mail) quote prices ranging from \$0 to \$15 per month for 500 e-mail addresses, and \$109 to \$150 per month for 15,000 e-mail addresses. For e-mail lists with a high number of subscribers, the mailings can be conducted without paying a third party vendor. Check with your hosting company and Web developer for options.

Advertising and Sponsorship

Web sites that receive significant traffic from a coveted audience most likely will appeal to advertisers and companies interested in sponsoring events. However, even if your Web site does not appeal to advertisers, it can be used to add value to other opportunities. For example, those companies who buy exhibit space at the Affiliate's Annual Meeting could be enticed or thanked with additional recognition on the Affiliate's Web site. If advertising or sponsorship is of interest, be sure to make note of the standard ad sizes and

build advertising space into the interface design. Be sure to have a plan for situations in which there are not any advertisements to post.

After carefully considering the features that best suit you Web site, be sure to consider the commitment required to support the feature. For example, if the Web site encourages feedback then the State Affiliate must ensure that every inquiry is responded to in a timely fashion (i.e, within 24 hours).

Creating a Web Site Outline

After reviewing the potential content and features, develop an outline of the Web site. The purpose of the outline is to identify a sensible way to organize the content (“information architecture”) and clearly communicate what is included on the Web site. All Web pages should include the Affiliate branding elements, site navigation, and footer copy. Level 1 items on the outline often correspond to the Web site navigation and lower level items on the outline correspond to navigation within each section (Figure 1). It is to be expected that some pages will be accessible via links under more than one category (e.g., membership directory). For the site outline, do not be overly concerned with the actual wording; the section headings, and other items can be finalized later in the process.

Developing a Budget

Items included in a Web site budget include hosting services, graphic design, domain name(s), maintenance costs, service fees (e.g., e-mail newsletters, e-commerce fees), and development and consulting costs. Before allocating funds to each category, investigate all your options because the budget is highly dependent on how the Web site is managed, and it can change dramatically from year to year. For example, if the majority of the budget is

FIGURE 1. EXAMPLE OUTLINE

- I. Home Page
 - a. Member login
 - i. Renew Membership
 - ii. Membership Directory
 - b. News
 - c. Upcoming Events
 - i. Upcoming Events for 2007
 - d. Sponsor and Advertising Banner(s)
- II. About Us
 - a. Mission
 - b. Affiliate Charter (PDF)
 - c. Affiliate Officers
- III. Membership
 - a. Benefits of Membership
 - b. Application for Membership
 - c. Renew Membership
 - d. Membership Directory
- IV. Continuing Education
 - a. Promotional information for up coming live programs in the region
 - b. Links to external programs on other Web sites
 - c. Sponsor Banner(s)
- V. Advocacy
- VI. Student Societies
- VII. Contact Us
- VIII. Elements Common to All Pages
 - a. Affiliate logo and header
 - b. Site navigation
 - c. Search feature
 - d. Footer copy

spent on development this year, then next year the majority of the budget might be spent on maintaining the new features. Or perhaps, spending significant portions of the budget to develop automated tools this year will decrease maintenance costs the following year. Generally, the graphic design, consulting, and maintenance will be the largest line items.

The costs of services is highly variable. As a general rule, neither the least nor the most expensive options are always the best. The goal is to only pay for the services you need, but be in a position to upgrade services as the Web site grows without incurring significant expenses. But, before investigating the costs of the services it's advisable to prepare a Web Site Brief.

Creating a Web Site Brief

A Web Site Brief is the business plan for the Web site. It includes the goals for the Web site, the audience profile, the site outline, budgetary limitations, hosting needs, and maintenance plans. The Web Site Brief is a key element to ensuring that available resources produce the best possible Web site, and that all those involved with the Web site are working toward the same goals (Appendix I).

The Web Site Brief should be reviewed by Affiliate staff and/or Executive Committee or Board, and revised until agreeable. Keep in mind that the original document will likely be updated as the Affiliate becomes more knowledgeable about its options, reviews proposals from consultants and vendors, and revises goals and plans for the future. Plus, at some point the content available via the Web site will outgrow the interface design and information architecture, and the site will need to be redesigned. Web sites are constantly evolving and always a work in progress.

EXAMPLE: WEB SITE BUDGET*

Item	Cost (\$/year)
Domain Name	\$ 18
Hosting	\$ 120
Monthly E-Newsletter	\$ 180
Site Maintenance	\$3,100
Consulting (Redesign/development)	\$3,200
TOTAL:	\$6,618

* Estimated costs for a small Web site maintained using the manual method.

EXAMPLE: WEB SITE BRIEF OUTLINE

- I. About the Affiliate
- II. About the Web Site
 - a. Web Site Goals
 - b. Target Audience
 - i. Summary
 - ii. Technical Profile
 - iii. Expectations and Needs
 - c. Site Outline
 - d. Hosting Needs
 - e. Maintenance Plan
- III. Requested Work
 - a. Internal Process
 - b. Work Needed
 - i. Implement _____
 - ii. Develop _____
 - iii. Recommend _____
 - iv. Maintenance Services
- IV. Timeline and Budget Considerations

Web Site Design

Designing a Web site is the process of merging the graphical interface, the information architecture and the actual content. A design concept usually consists of a primary design for the home page and one or two slightly modified versions of the primary design to accommodate secondary pages (i.e., those pages accessed via the home page). The visual appearance of a Web site should be consistent with the image of a professional membership organization and deliver its message clearly. There are a couple options for designing the graphical interface.

Some Web designers, hosting companies, and specialty vendors give you the option of selecting an interface design from a library of templates. Select a template based on visual appearance and how

well the template can accommodate the proposed content and navigation system. The advantage of pre-designed templates is that it saves time and money, and most templates embody proven principles of interface design for association Web sites. The disadvantages are that another Affiliate or association might use the same template and colors, or that none of the available templates will work well with the existing plan for the Web site.

Some hosting companies offer flat rate or reduced rate design services as part of their hosting packages. The degree of customization varies, and the complexity of the Web sites they build are often limited to accommodate new businesses with basic needs. However, this might be a reasonable alternative for small Affiliate Web sites.

Another approach is to hire a Web designer to create an interface that specifically accommodates your organization, content, and audience. This is the preferred approach if the site will be maintained manually (see *Maintaining Web Sites*), with a custom content management system (CMS), or with WYSIWYG software. The cost of hiring a graphic designer varies widely and is dependent on the scope of the work, but hourly rates range from \$25-\$250 per hour. Generally, reasonable rates for standard design work for a State Affiliate Web site range between \$60-90 per hour. Programming rates (e.g., database development) are usually higher and one might expect rates of \$95-\$125 per hour. However, every region, situation, and consultant is different, and in most cases a flat rate is negotiated and only work that falls outside the original scope of work is billed hourly.

MANAGEMENT TIP

The information architecture and manner in which the Web pages are designed and built has a significant impact on the work required to maintain the Web site. There are numerous strategies for streamlining the Web site maintenance process. Before proceeding with the design and development of a Web site, be sure to discuss the strategies for maintaining it. Simple things like using text-based news titles can save time and money without diminishing the quality of the Web site.

Web designers for hire can be identified by contacting those who manage admirable Web sites, through graphic design associations, through design industry publications, and by asking your colleagues. Evaluate Web designers by reviewing their portfolios and client list. Look for designers with a demonstrated understanding of membership organizations, experience in the areas for which you need help, and who are willing to create your Web site using HTML. Some designers use Flash to create Web sites, which would be appropriate for elements that exist within a Web site, but not for the entire State Affiliate Web site.

Once you have identified prospective designers and have confirmed their interest in the project, send the designers your Web Site Brief, schedule a time to discuss it with them, and then request a proposal. This process gives the designer the information they need to evaluate the project, make recommendations, and propose a budget. And, it gives you an opportunity to become familiar with the designer's style and ensure that they understand the work.

Because you provided the prospective Web designers with the Web Site Brief, the proposals you receive should all address the same work and be somewhat comparable. When reviewing Web design proposals make note of the number of unique design concepts the designer will present, the process for reviewing and revising deliverables (i.e., design concepts, finished Web pages), services that fall outside the scope of the agreement (e.g., image licenses, fonts), and what constitutes the deliverables. Deliverables

should include all the files that are part of the final Web site, and the source files used to create banners, graphics, headers, and other elements of the Web site.

Be sure to read the entire proposal and follow-up with the designer even if the proposed budget is too high. It is an excellent opportunity to get advice on the project and often times talking through proposal will uncover opportunities for reducing the cost. Plus, you might find that the original scope of work is not possible given your budget and a good designer will help you define a scope of work that is feasible given your budget.

“Make sure that your designer provides you with a copy all the source files used to create the graphical elements. . .”

A Web designer might propose search engine optimization (SEO) services. SEO services help Web sites perform better with search engines (e.g., Google, Yahoo!). Each search engine

has a proprietary means for indexing and ranking those sites it identifies when a user conducts a search. The search engine's goal is to return the most useful information possible. However, for some Web sites being listed in the top 20 of search results can have a significant impact on sales and Web site traffic (e.g., online flower stores, medical continuing education). As a result, some Web consultants have become experts at figuring out ways to improve the performance of a given Web site with search engines. Eventually the search engines change their algorithm and new strategies are necessary. Generally, SEO is not necessary for State Affiliate sites because a well-designed Web site that complies with HTML standards will be indexed by common search engines and easy to find.

Next Steps

Once a designer has been selected, some of the key steps in the design and development process include:

- ⦿ **Initial Planning Meeting.** Most designers will interview you to gather information on which they can base design decisions (e.g., colors, aesthetic) and create designs consistent with the Web Site Brief. However, you should review Web sites that are related to Affiliate Web site in some way (e.g., pharmacy organizations, non-pharmacy membership organizations) and identify examples of admirable colors combinations, page layouts, navigation systems, or other design elements. Share this information with your Web designer. Not only will you see what your competition is doing and improve your overall perspective of Web sites, it will stimulate ideas for your Web site and clarify your vision for the designer.
- ⦿ **Review and Revision of Site Outline.** The designer and State Affiliate work together to review and revise the site outline to accurately define the information architecture of the Web site and the site navigation. The site navigation for a Web site should be intuitive and consistent, and make good use of hierarchy. This is a great opportunity because the design team is unfamiliar with your terminology and content, so if they are confused others will be too. Content is usually presented by topic or by audience. For Affiliate Web sites, topic-based navigation is most likely to work best, with perhaps one or two links that identify content for a specific subset of the audience (e.g., technicians, students). The site

navigation should reside in the same place on every page and as a rule of thumb it should not contain more than 5-6 major categories. Most Affiliate sites include about 9 sections, so they should be separated into groups. For example, the core navigation appears across the top or down the left side, and a secondary navigation (e.g., Contact Us, Member Login, Home) appears in the upper right hand corner or other separate space. Separating the content into smaller groups makes it easier for visitors to find.

It's often time consuming and costly to change the navigational system of a Web site once a design concept has been approved and the site has been built. So, exercise diligence in the development of the site outline and planning the navigation system.

- ⦿ **Web Page Design Concepts.** One of the challenges of Web site management is resisting the urge and pressure to put material on the home page. For Affiliate Web sites a good strategy is to limit home page content to headlines and short descriptors followed by a link to subsequent pages for the full details. A Web site is much like a newspaper. The most valuable space is on the home page and appears on the screen without scrolling ("above the fold"). It's the first thing that your visitors see every time they visit the site, so use the space to focus their attention on key messages and provide easy access to the most popular features (e.g., member login). Increased speed of access to the Internet makes it easy to quickly access content available on secondary pages and therefore keep the home page clean and simple.

- ⦿ **Development and Testing.** Once the site outline, navigation system, and design concepts are finalized the Web pages and other features are created. Be sure to test the pages using different browsers, if possible, or ensure that your Web designer has confirmed compatibility with the specifications set forth in the Web Site Brief.

Provide your Web designer with the editorial copy for the Web site before he or she begins the design process. It can be delivered later in the process, but delivering it sooner ensures that the page designs and site architecture are designed so that they fit the content. It avoids costly modifications to the site architecture or navigation system late in the process.

Once the new Web site is made available to the public development will continue and maintenance begins. Make sure that your designer provides you with a copy all the source files used to create the graphical elements, which includes original layered Adobe Illustrator, Adobe Photoshop, Adobe Fireworks, Flash, and Dreamweaver files, as well as the original stock images.

Maintaining Web Sites

Keeping existing pages up to date, archiving old content, adding new information, and responding to messages received via the Web site is all part of maintaining a Web site. There are a number of strategies for maintaining your Web site, and the best strategy is dependent on available staff and volunteers, budget allotted to maintenance, and volume of updates expected. Web sites are usually maintained using one of the following approaches.

- ⦿ **Manual Method.** A Web consultant is retained to update the Web site upon receipt of a request from the Affiliate via e-mail or fax. The consultant makes the updates, the Affiliate reviews the changes to ensure accuracy, and then the pages are made available to the target audience (“published”). The Affiliate is charged an hourly or by page rate based on the work requested. The cost increases with the size of the Web site and the number of updates required. It also involves staff or volunteer time to prepare the update request, and review the new pages for accuracy. The major disadvantage of this approach is that the time from delivery of the update request to publication of the revised page can be longer than desired. There are several strategies that Web designers can use to minimize maintenance work (e.g., cascading style sheets, server side includes, integration of PDF files), and the options should be discussed with your Web designer up front.
- ⦿ **Association Specialists.** Contract with a vendor that specializes in managing association Web sites. Specialty vendors offer all the services associations commonly want, including hosting; tools that allow non-technical staff and volunteers

to update the Web site; graphical design templates that accommodate an association’s logo, name, and colors; membership directories, password protected areas, e-commerce capabilities, event calendars, and discussion boards. The benefit of this approach is that the Affiliate has complete control of the content, and key features are readily available for a fixed cost. The disadvantage is that the tools and features included in the package often cannot be customized, or customization results in extra charges.

In some cases the format of an Affiliate’s membership database is different enough from the stock database offered by the Specialty vendor that the functionality is compromised. Be sure to ask questions about how membership information is updated, the system via which user names and passwords are managed, and clarify the services included in the fixed cost versus those services that are extra (e.g., support, file back-up, exporting the membership database to excel). However, because an unlimited number of updates can be made for a fixed cost the Affiliate can realize savings over time and be able to offer a feature rich Web site on an accelerated timeline.

- ⦿ **Content Management Systems.** There are a number of content management systems (CMS) that can be configured to fit a specific Web site, and they vary with respect to complexity and cost. Generally, an Affiliate hires a Web developer to configure the system to manage the Affiliates Web site, or buys the application from a vendor, which includes installation and training. Much like specialty vendors, the system

includes tools that allow non-technical staff and volunteers to make updates, and capabilities that support membership directories, credit card transactions, calendar of events, and discussion boards. The advantage to this approach is that the CMS is customized to fit the needs and goals of a specific Web site. The disadvantage is that this approach is often more expensive and time consuming to implement than other options. However, because an unlimited number of updates can be made for a fixed cost the Affiliate will likely realize savings over time. The services offered by some specialty vendors rival the level of service obtained via this route, and is worth comparing the cost of the two options.

- ⦿ **Software Tools.** There are software programs (e.g., Dreamweaver® and FrontPage®) that simplify the creation and modification of Web pages. These WYSIWYGs (“What You See Is What You Get”) software applications provide a visual interface via which HTML content can be edited without any knowledge of HTML. If an Affiliate has staff or volunteer interested in learning to use the software and is familiar with the basics of Web development, the Affiliate can specify that the Web consultant design a site that can be updated using the selected software. The advantage to this option is that the cost of maintaining the Web site is a function of the software, and the staff and volunteer time required to make an update. The disadvantage is that there is a learning curve with the software and it is often not capable of managing all of the features planned for the Web site. Therefore, a technically skilled Web consultant will still be needed, though less frequently.

For small Web sites that are updated infrequently (e.g., 8-10 pages, updates quarterly), the most economical approach is often to pay your Web designer to make the updates manually. Because the updates are infrequent they can be planned in advance and the disadvantages of this approach (i.e., timeliness) can be minimized.

As a Web site grows and additional features are added the cost of maintaining the site increases and eventually reaches a point at which a fixed cost approach (e.g., specialty vendor, or CMS) to maintaining the site is more economical. A hybrid approach can also be very effective. In this case, a simple CMS is implemented so that staff and volunteers can maintain the sections of the site that are updated the most frequently and urgently (e.g., news, upcoming events), but a Web consultant is used to update other sections that change less frequently and are more complex.

“ . . . the best maintenance strategy is dependent on available staff and volunteers, budget allotted to maintenance, and volume of updates expected.”

Hosting Services

The graphics, code, documents and files that make up a Web site are loaded onto a computer called a Web server. Hosting companies maintain these servers in a controlled environment and connect them to the Internet. The host is responsible for ensuring that the Web server is available 24 hours a day, 7 days week, securing your files against unauthorized access, analyzing and reporting data from log files, and backing up your Web site files regularly. The host also handles additional services associated with your domain name, such as sending and receiving e-mail.

The log file reports include information such as how many unique users accessed your Web site, and their technical profile (i.e., type of Web browser, operating system, type of internet connection, geographical location, Web site from which they were referred).

For most State Affiliate Web sites a third party hosting company is ideal. A third party hosting company focus solely on hosting Web sites, which means their primary responsibility is making sure that your Web server has the latest software and security patches, and that all services and features are running efficiently. They are also very knowledgeable about the technology they offer, and help their customers use it. In most cases, answers to common questions are available online and responses to inquires are timely – because it is their business. Hosting costs vary, but can be as low as \$10 per month.

Hosting services are also available as additional service from your Internet Service Provider (ISP) (e.g., Comcast, Verizon), your Web designer, or specialty

vendors. The cost and services provided vary, but “value added” hosting (i.e., hosting is not the primary focus of the business) can be a viable alternative. But, it can also fall short of your expectations because hosting is not the vendor’s primary business.

Web designers and developers have differing opinions as to what they consider to be the best hosts. Hosting preferences are a function of the Web site(s) managed and personal comfort level with the technology involved. Unless there is a very compelling

“ . . . selecting the top ranked or the least expensive host is not the best method.”

reason, Affiliates should buy hosting services from a third party rather than through their ISP or Web designer. As Web sites grow it is expected that your needs with respect to

design, development, and maintenance services will change and you will change hosts or Web designers. Separating the hosting services from the design and maintenance services will save you time and money when you make changes. If your Web designer has a preferred hosting company, do consider it. However, set the hosting account up in the name of the State Affiliate and then provide the designer with access to the servers.

Selecting a company to host an Affiliate Web site can seem like a daunting task. Hosting companies offer a variety plans that include features for which the benefits are not readily apparent. Plus, it’s difficult to determine which hosting companies are reputable, compatible with non-technical customers, and able to support the growth of the Affiliate Web site. There are numerous Web sites that rank the hosting companies based on cost, customer service, and other characteristics (e.g., Hosting Review, Best

Web Hosting 2008, Web Hosting Features). These sites can offer useful insight, but selecting the top ranked hosting company or the least expensive hosting company based on ranking is not the best method.

Before evaluating hosts, define your hosting needs. For example, how many e-mail addresses do you need, do you plan to use proprietary software (e.g., FrontPage, Joomla!, or WordPress), which operating system do you need (e.g., Unix, Windows), and how likely are you to be comfortable with Web-based support versus telephone support. Some characteristics and features to consider include:

- ⊙ Company Description and location
- ⊙ Cost and Hosting Package (services vary by plan in most cases)
- ⊙ Hosting Set-up Fee and Discounts (e.g., 10% off if pay for a full year up front)
- ⊙ Customer Support
 - Limited or unlimited telephone support
 - Hours for telephone support (consider time zone)
- ⊙ E-mail Services
 - Number of addresses (e.g., William@your domain.org)
 - Web-based e-mail (can you check e-mail via a browser)
 - Spam Filters – type
- ⊙ Access Control Options – Allow you to create a members only section.
- ⊙ Advanced Features and Applications
 - Blog Software
 - Supported Content Management Systems (e.g., Joomla!)
 - Databases (type and number allowed)
 - Search Functionality

EXAMPLE HOSTING REQUIREMENTS

- ⊙ UNIX Server
- ⊙ Reliable service
- ⊙ 50 MB disc space and at least 150 GB/month of data transfer
- ⊙ Log analysis software to report site usage
- ⊙ Minimum of 10 e-mail addresses
- ⊙ POP3 and Web-based access to e-mail accounts: Allows users to access accounts via the Web or via an e-mail client (e.g., Lotus Notes, Outlook)
- ⊙ SMTP Server for sending e-mail.
- ⊙ Regular Web server back-up
- ⊙ FTP access to the Web server
- ⊙ Ability to upgrade hosting account should e-commerce, database services, or additional services become necessary.
- ⊙ 24/7 Support by telephone
- ⊙ MySQL database (at least 2 databases) for membership directory

Once you have defined your hosting needs, consult with trusted colleagues, other State Affiliates, IT professionals within the community, hospital, or practice environment; and your Web designer to find out which hosts they recommend. Evaluate the hosts by identifying the packages that contain the features outlined in your hosting requirements (e.g., support, MySQL database, e-commerce), comparing prices, recommendations from colleagues or other trusted sources, and reviews of the company online.

Conclusion

Having a Web site requires a variety of technical services, which include a domain name, a Web site host, technical skill to implement the Web site, and a plan for maintaining it. In addition to the basics, those charged with managing the Web site will be faced with evaluating a number of services, such as search engine optimization, blog software, content management services, and analysis of Web site metrics, among other things, on an ongoing basis. The key to success is developing and using a Web Site Brief to drive decision-making, and recruiting a qualified team to implement the vision.

Resources

1. American Institute of Graphic Arts

(www.aiga.org)

2. Graphic Artists Guild

(www.gag.org)

3. Hosting Review

(www.hosting-review.com)

4. Best Web Hosting 2008

(www.best-Webhosting-2008.com)

5. Web Hosting Features

(www.Webhosting-features.com)

6. Survey Monkey

(www.surveymonkey.com)

7. Zoomerang

(www.zoomerang.com)

8. Wikipedia

(www.wikipedia.org)

9. Word Press

(www.wordpress.com)

10. Moveable Type

(www.moveabletype.org)

11. Textpattern

(www.textpattern.com)

12. Hosted Blogs

(<http://yourblog.blogspot.com>)

13. Blogger

(www.blogger.com)

14. TextPad

(www.typepad.com)

15. Livejournal

(www.livejournal.com)

16. iContact

(www.icontact.com)

17. MailChimp

(www.mailchimp.com)

18. Boomerang

(www.boomerang.com)

19. Patron Mail

(www.patronmail.com)

20. Constant Contact

(www.constantcontact.com)

Appendix I: Example Web Site Brief

About the Affiliate

We are a professional society of pharmacists and related personnel practicing in organized healthcare settings. We are committed to serving and representing all pharmacy professionals in all practice settings. Our efforts and work will foster safe and effective medication therapy, promote innovative practice, and empower our members to serve the health care needs of the public. Most of those who perform society work are volunteers.

About the Web Site

Our members are spread out across the state, and due to geographical limitations and budget restrictions most of our communications occurs via e-mail and our Web site. The current Web site (www.yourdomainname.com) was established in 2003, and is hosted by Network Solutions.

Web Site Goals

The goals of our Society are to promote optimal patient outcomes, foster the professional development of pharmacy practitioners, and help pharmacy practitioners become a valuable part of the health care team. We expect our Web to help us make progress toward these goals by:

- Providing access to appropriate, high-quality educational opportunities
- Bringing visibility to results of new research and research opportunities
- Bringing visibility to professional advocacy issues and engaging membership in our efforts to ensure that our voice is heard
- Delivering messages of best practices
- Providing networking, access to resources, and information exchange opportunities

Target Audience

Our target audience consists of pharmacists, pharmacy technicians, pharmacy students, and our members. Our audience are not technically challenged, but aren't experts either -- we serve folks at all levels of technical capabilities.

Technical Profile

We do not have access to specific information about the technical profile of our target audience, but expect our Web site to be compatible with technology used by most of the profession. Before beginning work on the Web site, we will define the technical profile.

Expectations and Needs

Our target audience expects to use our Web site to get the latest information on timely topics, and access tools and resources needed in day-to-day practice. In addition, they want to use it to register for events, renew their membership or join for the first time, and post comments regarding specific news items. We want to configure our Web site so members only need one user name and password for all features, and so that they can easily manage lost passwords, or change their personal information. They want it to be easy and very user friendly.

Site Outline

See Appendix X.

Hosting Needs

While we've been satisfied with our host (Network Solutions) we would like to get the statistics on a monthly or quarterly basis. We've been told that this feature is included with our hosting plan (Standard Plan), but we need help configuring it. That said, a short-term goal is to implement e-commerce and integrate the membership database with the Web

site. We need confirmation that our current host can support our needs.

Maintenance Plan

Currently, we update the home and continuing education pages monthly. Other sections are updated infrequently. We send update requests to a volunteer “Webmaster” and he makes the updates.

Requested Work

We are seeking a Web consultant to help us improve our Web presence. We do not have a full-time staff devoted to Society business, and time and money are limited. Jenny Findlee is in charge of our Web site and is the primary point of contact. Once she gets materials that require approval they are presented to a small team for review and sign off. This is only for major efforts, not day-to-day Web site updates.

Work Needed

1. Integrate Membership Database with Web site. We maintain our membership information in a Microsoft Access. We need help determining the best approach to managing membership information. It must accommodate the Web site, and offline needs as well (e.g., updates received via fax and mail). Most importantly, it must make use of standard technology that can be used long-term.
2. Redesign Web Site. Revise the Web site to accommodate the site outline (Appendix X). We are satisfied with the look and feel, but need to update the navigation and content throughout.
3. Blog Software. We are interested in incorporating a blog into the new Web site. Specifically, we’d like to be able to post news

stories and issues for comment independent of a third party. We’d like for our members to be able to post responses after login into the member only area.

4. Web Site Statistics. We need to configure this feature so that we can analyze the way people are using our Web site on a monthly basis.
5. E-commerce. We would like to conduct credit card transactions (securely) via our Web site. In most cases, the transactions are for services and require a printable receipt with a confirmation number.

Timeline and Budget

Our annual budget for all Web related expenses is less than \$6,000. We are seeking a consultant who can work with us over a period of time to complete the work within our budgetary constraints.

We do not have a specific deadline for completing the work, but we would like to be finished by May 1, 2008, before the current group of volunteers is replaced by the 2008-2009 group.

Contact Information

Primary Contact Phone

Primary Contact e-mail

Primary Contact Fax:

Mailing Address:

Appendix X: Site Outline

- I. Home Page
 - a. Member login
 - i. Renew Membership
 - ii. Membership Directory
 - b. News
 - c. Upcoming Events
 - i. Upcoming Events for 2007
 - d. Sponsor and Advertising Banner(s)
- II. About Us
 - a. Mission
 - b. Affiliate Charter (PDF)
 - c. Affiliate Officers
- III. Membership
 - a. Benefits of Membership
 - b. Application for Membership
 - c. Renew Membership
 - d. Membership Directory
- IV. Continuing Education
 - a. Promotional information for up coming live programs in the region
 - b. Links to external programs on other Web sites
 - c. Sponsor Banner(s)
- V. Advocacy
- VI. Student Societies
- VII. Contact Us
- VIII. Elements Common to All Pages
 - a. Affiliate logo and header
 - b. Site navigation
 - c. Search feature
 - d. Footer copy