

HUD'S WEB MANAGEMENT OPERATING PROCEDURES

HUD has three documents that describe the policies and procedures for web management:

- HUD's Web Management Organization and Policies: documents the Departmentwide web policies on which all procedures are based
- HUD's Web Publication Procedures and Style Guide: documents the procedures for publishing content and the content style rules for all of HUD's websites and for applications posted on HUD's websites and kiosks
- HUD's Web Management Operating Procedures: describes how we perform all the functions and activities associated with managing HUD's websites.

All HUD managers, Web Managers, Web Coordinators, and others who are involved in managing HUD's web products and related customer support should know and use these documents.

CONTENTS

Overview of HUD's Web Management Strategy

Section 1: Roles And Responsibilities

- A. Roles Of All Web Managers
- B. Departmental Web Team
- C. Headquarters Web Managers
- D. Regional Web Managers
- E. Web Coordinators

Section 2: General Procedures

- A. Managing Hud.Gov
- B. Managing Espanol.Hud.Gov
- C. Managing [Hud@Work](#)
- D. Managing Archives.Hud.Gov (Records Management)
- E. Managing Kiosks
- F. Managing HUD Public Computers (HUD-Pcs)
- G. Managing Web Clinics
- H. Managing Marketing And Outreach
- I. Providing Good Customer Service Through Webmail
- J. Management Consulting
- K. Web Management Training
- L. Training HUD Staff
- M. Interagency Efforts
- N. Other Departmental Web Management Duties

Section 3: Management Controls

- A. Certifications
- B. Posting Rights
- C. Content Quality Control
- D. Emergency Procedures
- E. Content Coordination
- F. Brand Infringement And Fraud
- G. Data Accuracy
- H. Kiosk Performance Standards
- I. Quality Management Reviews (QMRs)

June 1, 2005

J. Using Web Analytical Tools

Web Management Calendar

Appendices

Appendix A: HUD's Web Management Organization

Appendix B : Coordinating Kiosk Moves

Appendix C: Manually Programming The LAN Kiosk LED

Appendix D: Checklist For Web Clinic Training Teams

Appendix E: Checklist For Web Clinics Hosts

Appendix F: Quick Guide To HUD's Homes And Communities Website

Appendix G: How To Conduct A Focus Group

Appendix H: Conducting Staff Training

Appendix I: Using The Web To Implement HUD's Strategic Goals

Appendix J: Quality Management Review (QMR) Standards

Appendix K: Quality Control

Appendix L: Using The 404 Error Reporting Application

OVERVIEW OF HUD'S WEB MANAGEMENT STRATEGY

When HUD's website debuted in 1995, we made a discovery: citizens expect to get information and services directly from HUD. Some managers objected: "Citizens aren't our customers. We work through intermediaries. We're wholesalers – not retailers." The web changed this paradigm. It caused HUD to create a new product: citizen-centered information and services.

We began by examining our audiences: what do they want to know? What do we want to tell them? Within months, we refocused our website on "homes and communities" – not HUD. We drew content from inside and outside of HUD, adding value by organizing it in ways that make sense to citizens.

When we encountered voids in content that citizens wanted, we became entrepreneurial. In 2000, we began teaching free Web Clinics, encouraging HUD's grantees and partners to create content to which we link. We developed free software - HUD's Web Clinic Wizard - to make it easy for them to build websites.

Why Are We Successful?

We deliver our product innovatively:

- Our Homes and Communities website is organized by audience, by topic, and by location, giving visitors choices in their exploration.
- 97 web-based touch-screen kiosks - premiering in 1997 – are available in malls and other public places, offering content to audiences HUD normally wouldn't reach. And now, they offer information not just from HUD, but also from other federal agencies.
- HUD Public Computers – computer workstations available in HUD's 80 offices – address the digital divide by providing free web access.
- "Español.hud.gov" mirrors our English version of "Homes and Communities."

Finally, we market our product.

- We demonstrate our web products in public places such as State Fairs.
- We publicize our website address, putting it in brochures and on faxes, business cards, office signs, and voice mail.
- We train our staff to use the website, so they - in turn - can use it to help our customers.
- We listen to the audience - through email, calls, and focus groups - to improve web content.

HUD was a pioneer in using a comprehensive strategy to produce a product that citizens want.

HUD's Governance Structure

HUD's web governance structure has been a model in the federal government for years. The biggest reason? From the beginning, we tied the websites to mission accomplishment.

The top of our web management structure is HUD's Chief Operating Officer, the Deputy Secretary.

The Office of Departmental Operations and Coordination supports the Deputy Secretary and coordinates and directs day-to-day operations of HUD's web management organization.

June 1, 2005

The Departmental Web Team - a group of Management Analysts expert in analysis, problem solving, and writing for the web - manages the product.

The Chief Information Officer ensures that HUD has the technical infrastructure to support our web products, and the Assistant Secretary for Public Affairs helps us market our web products. The Chief Procurement Officer makes sure that HUD contracts for web services comply with HUD's policies and procedures.

Each HUD office contributes to the product. Top executives and managers throughout the Department are responsible for developing and maintaining content to accomplish HUD's mission and goals.

Content management and technical support are viewed as two separate functions, and staff skilled in each work together to ensure the HUD's web products are the best they can be. Web Managers throughout HUD are management consultants and audience advocates, ensuring that content is tied to HUD's mission while addressing citizens' needs. Web Coordinators are designated in Field Offices and program offices to help Web Managers develop and maintain web content, promote HUD's websites, train staff to use the websites, and carry out other web management functions. Contractors provide most of the technical support for HUD's web products.

HUD's web products help achieve its mission, and the governance structure supports that outcome.

What's Unique About HUD's Strategy?

For 30 years, HUD sent citizens to intermediaries - public housing agencies, nonprofits, community-based organizations, state and local governments, lenders, and others - to get information. Now, HUD values its obligation to citizens by treating citizen information and services as a product.

HUD's strategy enabled it to avoid problems other agencies face:

- Content - not the website - is our product. We put product development in the hands of content experts, tied it to our top management official, and committed the resources to be successful. Other agencies continue to struggle with organizational placement and staffing.
- We approached product development from a citizen's viewpoint. We created content around topics, audience, and geography - not around HUD's organization.
- We know that citizens don't understand government organization. We mandated one HUD website with a common look and feel, avoiding a proliferation of unconnected websites from each sub-organization.
- We recognized that some citizens don't think of HUD as a resource; so we put easy-to-use kiosks in places where they live, shop, and work - in effect, taking HUD to the people.
- We give our partners grants and loans to deliver services to citizens. We reach out to teach them how to provide those services online; and we link their content into our websites.
- We know that citizens need help finding what they want. We market our products, leading citizens to the information and services we provide.

June 1, 2005

The key is putting it together, in a unified product plan.

How Do We Know It Works?

HUD's citizen-focused web-delivered content helps citizens solve their problems and accomplish their objectives.

Audience Feedback

"Just wanted to thank you for this wonderful website...without (it), we probably would never have known about the property that we were successfully able to purchase." - jeribo@AOL.com

"This is the ONLY site...that gives information without a sales pitch...this is very effective, educating the buyer before he/she/they get too deep and can't get out." -Sheila J Schweers, Florence, SC

"Your HUD Public Computer in the Orlando office is fantastic! It has current and relevant information to the Orlando area and then leads you onto other local, state, and national sites/info." – Anonymous

"We started our website because of the clarity of the HUD (web clinic) in Albuquerque. Suddenly, a website seemed do-able." – Aspen Behavior Health

Expert Evaluations

- *Assessment of HUD's Kiosk Program*, Diversified Business Consulting Group, February 2003: 78% of kiosk users are low income; 87% don't have Internet access; and 74% take action after using the kiosks.
- The Public Strategies Group: "(HUD's website is) a pioneer among federal agencies in how to put useful information in the hands of customers and stakeholders," Fall, 2000, *Review of HUD*

Awards/Recognition

- Digital Government Award, MIT/Accenture, 2000.
- Best Feds on the Web: *Government Executive Magazine*, 1997, 1998
- E-Gov Trailblazer Award: HUD's Web Clinics, 2001
- Excellence in Government Award: HUD's kiosks, 2001
- Solutions Award: Center for Excellence in Information Technology: HUD's kiosks, 2000
- E-Gov Pioneer Award: HUD's kiosks, 1999

Who Benefits?

People all over the world who need information about homes and communities in the United States benefit from HUD's web products. They get what they want, when they want it, in ways that make sense to them.

- From our website, they can learn how to buy a home, watch webcasts about fair housing, get answers to homebuying questions, subscribe to mailing lists to receive current information, and participate in discussions on topics of interest.
- From our kiosks, they can search for subsidized apartments in their area, find listings of HUD homes for sale, and locate services for the homeless.

June 1, 2005

- From our Public Computers, they can file fair housing complaints, find out if they're owed an FHA refund, and print out handbooks and forms.
- People who read Spanish can use the Spanish version of the kiosks or espanol.hud.gov to get the information they need.
- HUD partners benefit from our Web Clinics by learning to create their own public service websites; and citizens benefit by getting access to more information and services about homes and communities, online.

By delivering a citizen-centered product, citizens are more satisfied with their government experience.

SECTION 1: ROLES AND RESPONSIBILITIES

A: ROLES OF ALL WEB MANAGERS

Web Managers at HUD have 7 major roles:

1. **Writers/Editors/Communicators:** Act as editor-in-chief of the web products. Determine the focus, organize the content, write the segues, make sure we use plain language, manage the tone.
 - **How Do We Do It?** We know and understand our audiences. We test our content to make sure that each page has a clear purpose. We apply writing standards and rules for plain language. We test content with someone who knows nothing about it before we post it. We know that “less is more” on the web, and we use our editing knowledge to make sure that our content communicates effectively for the intended audience.
2. **Consultants/Entrepreneurs:** Help managers figure out how to use the web to achieve their missions and reach their goals. Stir the pot and create business for the web.
 - **How Do We Do It?** Know HUD’s mission and goals. Get familiar with the Secretary’s priorities and think about ways to use the web products to further them. Find out what managers want to do, and take ideas to them. Meet with your organization executives and Office and Division Directors. Inspire and excite them by showing them “what’s in it for them.” Get on the agenda of management meetings. Tell them what you’re doing, and invite their ideas. Show that you know what they do, and tell them how HUD’s web products can help them do it better.
3. **Advocates:** Listen to our audiences – citizens, partners, employees.
 - **How Do We Do It?** Conduct focus groups, monitor email, collect the “good stories,” get out and talk to the people. Learn what our audiences want and need, and make sure our web products deliver. Invite audience groups to meet with you. Tell them what you’re doing. Seek and observe their reactions. Go to homebuyer fairs, Neighborhood Networks centers, and other HUD events attended by the public – and talk to the folks. Keep your ears open for new ideas – you never know where they’ll come from...evening news, conversations with neighbors, local talk shows. Email people who email you, and ask them for their ideas. People love to be asked for their opinions.
4. **Marketers:** Go out and tell our audiences what HUD has to offer.
 - **How Do We Do It?** Demo our websites at conferences, trade meetings, state fairs, home and garden shows – anyplace there are potential homebuyers, renters, community organizers, or HUD partners. Take advantage of marketing efforts of other HUD staff to piggyback web marketing. Seek successful marketers - pick their brains! Contact Web Clinic alumni – help them organize a public service night where they tell citizens about their services and their websites. And then you can talk about HUD’s website. Distribute HUD web brochures to libraries, grocery stores, and other places with free public displays.
5. **Teachers:** Show staff how to use the web, in general, and our websites, in particular, so they can help our customers use the site successfully.

- **How Do We Do It?** Set up “drop in” sessions where staff can stop by and ask questions about how to use the websites. Set up mini-training sessions during lunch hour – showcase two or three great things about our websites.
6. **Visionaries:** Look to the future. Think about new ways to use the web to serve HUD managers and our audiences. Inspire creativity in others with our own passion for what we do. Know what’s going on across government with the web, and make sure HUD is a part of it.
- **How Do We Do It?** Find out what other government agencies are doing, and figure out how we might do similar kinds of things. Monitor webcontent.gov to learn the latest trends and news. Participate in the Web Content Managers Forum and in interagency web management task groups. Attend interagency workshops. Read about new technologies – think how we can use them to serve citizens. Spend time each week pondering this question: what could we do with the web to serve citizens better? Brainstorm with one another. Brainstorm with family and friends. Think big – dream big.
7. **Managers:** Web content is a product that needs to be managed like any other product. Develop production plans, monitor progress, trouble-shoot problems, and measure success.
- **How Do We Do It?** We plan and organize our time to be as efficient as possible. We use our resources effectively. We identify potential problems and either address them or elevate them to the appropriate level, in a timely manner. We keep everyone who needs to know informed on our progress. We make the hard decisions, based on policies, procedures, common sense, and “doing the right thing for Americans.”

HUD’s web management organization chart is available in *Appendix A*.

SECTION 1: ROLES AND RESPONSIBILITIES

B: DEPARTMENTAL WEB TEAM

The Departmental Web Team sets the direction for, trains, and coordinates HUD's web management organization and has overall responsibility for the content of all of HUD's web products. Duties include:

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

Here is a more detailed list of the Departmental Web Team's responsibilities:

General management

- Develop, document, and communicate strategies and plans
- Monitor results and report on outcomes (for example, annual State of the Web report)
- Develop, document, and communicate policies and procedures for web operations and publication
- Establish performance criteria and monitor performance, for example develop criteria and participate in Quality Management Reviews
- Establish and manage priorities, both for long-term efforts and day-to-day web operations
- Establish management controls to ensure HUD's web products are managed efficiently and effectively, for example quarterly certifications and the Content Quality Control program
- Develop and manage budgets for tech support for Internet/intranet and public access technologies (kiosks and HUD Public Computers), including writing all supporting documentation, statements of work, and OMB reports and defending the budget requests
- Act as Government Technical Monitor (GTM) and provide routine direction and guidance to tech support contractors
- Develop and manage the annual operating budget for the web team
- Develop and implement web records retention policies and schedules
- Ensure that web management and web-related activities are incorporated into HUD's ongoing management processes, including Management Plan
- Develop and maintain liaison with key partner offices in HUD, including CIO, Public Affairs, and Field Policy and Management
- Participate in the Department's emergency planning activities and develop procedures for Continuity of Operations (COOP)
- Participate in other Departmentwide and ad hoc initiatives, as requested (for example, Customer Care/USA Services)

- Represent HUD on interagency activities and initiatives, for example, the Web Content Management Working Group

Product Management

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

Organization Management

- Analyze HUD's web management needs and develop/propose organizational changes to the Deputy Secretary
- Direct and guide Headquarters and Regional Web Managers and Web Coordinators through routine meetings and individual interactions
- Plan and conduct Web Manager training, including counterpart meetings, conference calls, and written guidance
- Develop prototype job descriptions, performance standards, and crediting plans for Headquarters and Regional Web Managers
- Trouble-shoot staffing or organizational problems
- Seek and communicate outside training opportunities for Web Managers (courses, conferences, speakers, etc.)

Customer Support

- **Management Consulting**
 - Reach out to new political appointees as they come onboard and brief them on HUD's web products, offering suggestions for ways they could use them to their benefit

June 1, 2005

- Routinely solicit opportunities to meet with managers at all levels to consult on ways to use the web
- Generate opportunities to meet with managers to offer web-related suggestions for ways they can accomplish their mission. For example, offer to do web briefings at staff meetings and distribute ideas for using the web to meet Management Plan goals.
- Respond to requests from managers for consulting

- **Customer Service**
 - Establish/oversee Departmentwide procedures for responding to web-related email
 - Respond to email addressed to Web Team
 - Respond to customer questions via the phone
 - Respond to customer questions via personal visits

- **Marketing and Outreach**
 - Develop and implement marketing strategies to inform audiences about HUD's web products
 - Conduct routine staff training on how to use the web
 - Conduct focus groups with HUD employees, partners, and citizens, to ensure that our web products remain responsive to their needs and to let them know about our products
 - Routinely communicate with HUD staff to keep them informed about what we're doing,
 - Develop and distribute promotional materials (brochures, etc.)
 - Plan and conduct Web Clinics for HUD partners, including developing and distributing the Web Clinic Wizard

SECTION 1: ROLES AND RESPONSIBILITIES

C: HEADQUARTERS WEB MANAGERS

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

What Makes You Unique?

Headquarters Web Managers are unique in three ways:

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

Coordinating Content Within Your Organization

To develop content from your organization, work both from the top down and the bottom up.

- Meet routinely with your Principal Staff member or designee to brief him/her on web initiatives and accomplishments, to solicit input, and – most of all – to make sure you understand your Principal Staff member's priorities and goals.
- Ask to get on the agenda of staff meetings at all levels (Assistant Secretary down to Branch Chiefs and Team Leaders) several times a year to show them what's on your pages and get their ideas.
- As new managers are hired into the organization, brief them on their web pages and get their ideas about content they might want to develop.
- Keep all your managers informed on the status of certification efforts; ensure that they understand that it is their role to keep content current and accurate.
- Be sure to keep any out-stationed managers in the loop.
- Find ways to report your accomplishments to your entire organization. Ask for their ideas and suggestions.
- Conduct training for the staff in your organization, so they'll know how to use the web and our websites.
- Encourage managers to promote HUD's websites in their marketing efforts and public events.
- Seek opportunities to demonstrate HUD's website – and your pages – for our target audiences, including citizens.
- Ensure that your organization has documented procedures for clearing all content that goes on your web pages.

Obtaining/Overseeing Your Technical Support

In FY2000, HUD's Departmental Task Force on Web Management recommended that responsibilities for web content management and responsibilities for web technical support be assigned to separate staff, skilled in those distinct areas.

You have a few options for managing your technical support:

1. You can train HUD employees to do it.

June 1, 2005

2. You can hire contractors to do it.
3. You can purchase services from the Departmental Web Team's tech support contractor.
4. You can do it yourself.

The Departmental Web Manager for Headquarters Operations will arrange training for your technical support staff or contractors, to ensure they know how to use the templates.

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

Developing and Overseeing Generic Content

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

Here are some of the implications of that policy:

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

SECTION 1: ROLES AND RESPONSIBILITIES

D: REGIONAL WEB MANAGERS

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

What Makes You Unique?

Regional Web Managers are unique in four ways:

- You strive to provide the same level of service to citizens, partners, and employees across the country; thus, you must develop and manage content – both on the Internet and Intranet – as a team. All of your content development is dictated by templates that you help develop, along with the other Regional Web Managers and the Departmental Web Manager for Field Operations. You work across organizations within the region to develop the content for your web pages.
- In addition to managing content for the Internet and Intranet, you also manage placement and promotion of kiosks and HUD Public Computers.
- You coordinate Web Clinics in your regions.
- You are responsible for inherently local content on HUD’s websites.

Managing Common Content

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

Because you are physically located all over the country, you work “virtually,” relying on email, online discussions, and phone calls to work with your teammates and get general direction from the Departmental Web Manager for Field Operations.

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

Managing Kiosks and HUD Public Computers

Kiosks and HUD-PCs are part of HUD’s efforts to bridge the digital divide and reach underserved populations. The success of these efforts depends, to a large extent, on you. Kiosks must be placed in public locations where they have the greatest exposure. HUD-PCs must be up, running, and visible to drop-in customers and to those who seek them because they don’t have access to the Internet.

Specific procedures for managing kiosks and HUD-PCs are explained in Sections 2-E and 2-F.

Coordinating Web Clinics

HUD's very successful Web Clinics teach our partners how to create good public websites that deliver the services we fund through our grants and other programs. You serve as the local coordinator for the Clinics that are scheduled in your region. That means you work with your Web Coordinators and the Field Office Directors to make those Clinics a success. If possible, you attend the Clinics in your area.

Specific procedures for coordinating HUD's Web Clinics are explained in Section 2-G.

Managing Inherently Local Content

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

Here are some of the implications of that policy:

- Any parts of the state page templates that apply to a specific program area – for example, the local CPD office information – must be coordinated with the Headquarters Web Manager, who will ensure that program managers agree with the content of the template. The local templates can be posted only after the Headquarters Web Manager signs off.
- Good stories, on the other hand, are typically “inherently local.” They should be developed on state pages. You should let the appropriate Headquarters Web Managers and the Departmental Web Team know when you post good stories, so they can link to them from the national pages.
- Your state pages on the Internet are the bridge to our partners' websites; so – within the templates – you will help our audiences find that local connection that will enable them to solve their own problems and achieve their own objectives. You play an important role in delivering “seamless services for citizens.”

SECTION 1: ROLES AND RESPONSIBILITIES

E: WEB COORDINATORS

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

Web Coordinators help the Web Managers handle the full range of activities associated with managing HUD's 3 websites (hud.gov, espanol.hud.gov, and hud@work), HUD's web-based kiosks, HUD's Public Computers (HUD-PCs), Web Clinics for HUD Partners, staff training, and marketing and outreach efforts to promote HUD's web products. These are just some of the important duties you carry out in support of HUD's web efforts:

- You help create, update, and manage the content of our websites. That includes helping manage the quarterly content certification process.
- You help teach HUD staff how to use the web, and our websites in particular, so they can do their jobs more easily and so they can help our customers find what they want and need, on our websites.
- You help tell our customers about our websites by handing out brochures at homebuyer fairs and doing demonstrations of the website at local events.
- You help find good locations for our kiosks, which are delivering important information to low-income citizens who don't have access to the web.
- You answer the email generated by our website, helping citizens and partners solve their problems and achieve their goals.
- You maintain regular contact with the person designated as the web-contact in each program area in your office, which would include CPD, Public Housing, Housing, and Fair Housing in a full-service office.
- You are "eyes and ears" for the Web Managers, helping them identify opportunities to use the web to accomplish HUD's mission and goals.

What's in it for you?

Well, hopefully, you enjoy having a real impact on citizens. But at the same time, you are learning about our web management operations and are acquiring experiences and skills that could help if you should choose to apply for a Web Manager position at some point in the future.

Being a Web Coordinator takes good analytical skills, writing skills, editing skills (yes - we know that's hard!), organizational skills, communication skills, and customer service skills...and a whole lot of patience! You are critical to the success of HUD's web products; you are valued members of the web management organization.

Getting to Know Your Duties

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

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

June 1, 2005

(Headquarters) who develop the content, and make sure they are aware of HUD's policies and procedures.

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

SECTION 2: GENERAL PROCEDURES

A: MANAGING WWW.HUD.GOV

Purpose: The first thing you need to know is the purpose of HUD's Homes and Communities website:

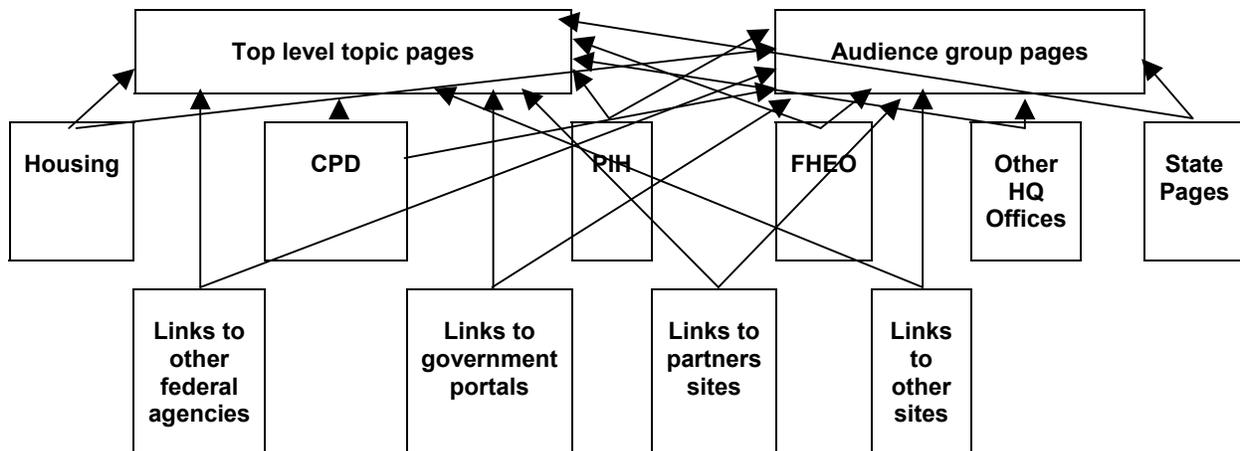
HUD's Homes and Communities Page is a clearinghouse of information and services about homes and communities for citizens and for our current and potential business partners. It's designed to empower citizens and business partners by giving them what they want, when they want it, in ways that make sense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

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

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

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

While that may sound like a "top down" approach, the website also works on a "bottom up" approach. The Departmental Web Team draws content from Headquarters sections and from state pages, through links, to form broad cross-organization content. Thus, all lower-level sections "feed" the top sections.



Departmental Web Team Responsibilities

- **Template Design:** The Departmental Web Team designs the template used throughout the website. The design is based on a variety of factors, including
 - HUD's mission and strategic goals
 - Laws, regulations, policies, and other requirements

- Customer feedback through webmail, customer satisfaction surveys, and focus groups
- Usability principles
- Changing needs and priorities of the Department
- **Front Page:** The object of the front page is to a) tell citizens about the most important services that HUD offers them, b) offer an opportunity for our Public Affairs Office to tell the public about important HUD news, and c) teach all web visitors how to navigate our website.

Most of the front page of HUD's website remains static. Only two sections change with any regularity:

- The "feature," which typically promotes HUD's killer content: homeownership, and
- The "highlights," which are quick links to current and/or "hot" information. Public Affairs often uses the highlights sections to spotlight news releases and Secretarial initiatives.
- **Topic Level Pages and Audience Group Pages:** In most – but not all – cases, the topic level pages and audience group pages are managed by the Departmental Web Team and are located in the "root" directory. The reason for this management policy is that no single office or organization in HUD "owns" a topic or audience. In fact, information about a topic or for an audience may come from many parts of HUD. Departmental Web Team members organize and layout content, write segues, incorporate links to program and state information, and link to other related info on outside websites.
- **State Pages:** The Departmental Web Manager oversees the design and implementation of the state pages, working with the Regional Web Managers.

Headquarters Office Pages

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

State Pages

- One of the most important objectives of HUD's web products is to ensure that all Americans have access to consistent, high quality information and services, no matter where they live. Thus, at the local level, HUD's website is organized by state; and we ensure that the same information is available on every state page. The state pages supplement the national pages by providing specific local information. Where appropriate, links are created to Headquarters content that is generic or Departmentwide in nature.
- Regional Web Managers work with the Departmental Web Team to develop the standard content templates for the front page, each topic level page, and – where consistencies can be found – sub-topic level pages.
- Links back and forth tie national and local content together in ways that make sense to the audiences.
- Changes to state page templates are made only after vetting among the Regional Web Managers and with the approval of the Departmental Web Manager.
- Once the content templates are agreed upon, they are "locked down." Everyone provides the same information, in the same order, using the agreed upon terminology, making it easy

June 1, 2005

for the web audience to locate comparable information from state to state, in terms that do not vary.

- The Departmental Web Manager is responsible for overseeing the state pages, including trouble-shooting problems.
- Regional Web Managers are responsible for developing and managing the local content on state pages.

SECTION 2: GENERAL PROCEDURES

B: MANAGING ESPANOL.HUD.GOV

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

Departmental Web Team's Duties

The Departmental Web Team manages espanol.hud.gov, including:

- Establishing translation priorities
- Assigning work to the translation contractor
- Reviewing work of the contractor
- Coordinating work among contractors (translation and tech support)
- Managing marketing efforts
- Developing the annual budget
- Establishing and monitoring management controls to ensure websites are in synch
- Responding to email and questions in Spanish
- Troubleshooting problems

Web Managers' Duties

Web Managers are responsible for notifying the Departmental Web Team when significant new content has been created or important content has been updated. The Departmental Web Team will send the content for translation if it falls within established priorities.

SECTION 2: GENERAL PROCEDURES

C: MANAGING HUD@WORK

HUD's intranet – called “hud@work” – is our internal website, available only to HUD employees. Our audience for hud@work is *only* HUD employees.

Like the Internet sites, hud@work has a standard template. Headquarters information is organized by Office. Field Information is organized by topic, and standard topics are used across the country.

Employee surveys, focus groups, and usability studies make clear that employees feel this way about [hud@work](#):

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

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

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

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

Departmental Web Team's Duties

- **Template Design:** The Departmental Web Team designs the template that is used throughout the website. Like the Internet front page, the design is based on:
 - HUD's mission and strategic goals
 - Laws, regulations, policies, and other requirements
 - Employee feedback through webmail, customer satisfaction surveys, and focus groups
 - Usability principles
 - Changing needs and priorities of the Department
- **Front Page:** Like the Internet front page, the [hud@work](#) front page is designed to showcase the most important information and services that employees need to do their jobs and teach employees how to navigate the website. The Departmental Web Team manages the front page and some other topic level pages.
- **Department Level Pages:** For the most part, Department level pages are managed by the organization having the most functional responsibility for the subject matter. Because so much of [hud@work](#) relates to how HUD operates (facilities, equipment, personnel, etc.), the Office of Administration owns many of the Department level pages.

Headquarters Office Pages

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

June 1, 2005

Regional Pages

Regional pages provide important local information to help Field employees do their jobs. There are 5 regional topics on [hud@work](#):

- Local news
- Local travel
- Customer service
- Management plans
- Library

SECTION 2: GENERAL PROCEDURES

D: MANAGING ARCHIVES.HUD.GOV

Archives.hud.gov contains HUD's historical documents, data, and other information that may have value to researchers and the public. It separates historical documentation from current information. Archives.hud.gov ensures citizens can access information about past programs, administrations, initiatives, and activities of the Department.

Procedures for transferring pages to archives.hud.gov, including guidelines on links contained on those pages, are provided in HUD's Web Publication Procedures and Style Guide.

Web Managers should work with program managers to decide what should be archived and to decide how long content should be maintained in archives.hud.gov.

Departmental Web Team's Duties

The Departmental Web Team manages archives.hud.gov, working with Web Managers and HUD's Departmental Records Management Officer, in Administration.

- The Web Team establishes and communicates procedures for archiving documents, including providing appropriate training.
- The Web Team works with the Departmental Records Officer to transfer new content in archives.hud.gov to the National Archives and Records Administration at regular intervals.

Web Managers' Duties

All Web Managers should work within their jurisdictions to make sure that managers are aware of the policies and procedures for archives.hud.gov, to make sure that each certification cycle includes consideration of which files should be moved to archives, and to work with the Departmental Web Team to move files at the appropriate time.

- Content on HUD's public websites should be evaluated on a quarterly basis, as part of the certification process, to determine if it should be archived.
- Content regarding previous administrations and their initiatives should be moved to archives.hud.gov at the end of their tenure.
- Dated cyclical material (e.g., funding announcements, grant applications, etc.) should be moved to archives.hud.gov at the beginning of the next cycle.
- Press releases, focus messages, statistical reports, and other serialized content should be archived after one year.
- When a program becomes obsolete, then basic program content should be archived.
- Any web page on HUD's public websites that is being considered for deletion should be evaluated for possible inclusion on archives.hud.gov.
- Navigational pages or other pages that have limited historical value should not be archived.

Disposition schedule

- The Departmental Web Team will note new additions to the archives.hud.gov site in section entitled "What's new on archives.hud.gov" page, with a schedule to transfer these records to NARA on a quarterly basis.
- The Departmental Web Team will work with the CIO to transfer pages listed on "what's new on archives.hud.gov" to NARA on a schedule agreed upon between HUD and NARA.

June 1, 2005

- Web Managers should work with program managers to evaluate content that has resided on archives.hud.gov for more than 7 years and has been transferred to NARA for final disposition, to decide if it should be removed.

SECTION 2: GENERAL PROCEDURES

E: MANAGING KIOSKS

Background

HUD's kiosk program began in 1997. Over the years, 106 kiosks were placed in shopping malls, transportation centers, grocery stores, and other public places. Currently, there are 97 active kiosks.

Kiosks were designed to bring HUD to the people and to deliver basic information to those who wouldn't think to come to the government for information or who don't have access to the Internet.

In 2004, HUD's kiosk program expanded to incorporate partnerships with other federal agencies. Now, "Government Kiosks" showcase basic government information, available at the touch of finger.

Kiosks use a standard template and information. Where possible information is localized (for example, HUD homes for sale listings show only homes for sale in the local area).

Departmental Web Team's Duties

The Departmental Web Team manages the kiosk program. Duties include:

- Work with the Office of Administration and the CIO to ensure that technical support for the kiosks (equipment, surround, maintenance, moves) is managed effectively.
- Work with the Regional Web Managers and Field Office Directors to move under-performing kiosks.
- Work with other Federal Agencies, the Office of Administration, the Chief Procurement Officer to solicit, manage, and maintain formal partnerships to display content from other agencies on the kiosks.
- Establish policies and procedures for managing the kiosks
- Monitor performance of the kiosks and take action to ensure that the program is operated efficiently and effectively.

Regional Web Managers' Duties

Regional Web Managers work within their jurisdictions to ensure that the kiosks are managed efficiently and promoted effectively.

Performance Criteria

Kiosks must be located in places where we can ensure maximum use. Based on a study of HUD's kiosk program, HUD has established the following requirements:

- Be located within 5 miles of the target population, which is low income individuals,
- Have both evening and Saturday hours, and
- Average 3,000 users per year, or 250 per month

If a kiosk fails to average 250 users per month for 3 months, the local staff must take action to improve usage. If a kiosk fails to average 250 users per month for 6 months, the local staff must take action to move the kiosk to a location that promises better usage.

Kiosk Locations

When identifying a location for kiosks, we want to find places where they'll have 1,000 users per month – not just the monthly minimum. Kiosks are most successful when they are located in shopping malls, 24-hour grocery stores, transportation centers, and 24-hour department or discount stores.

Kiosks may NOT be located in federal buildings, city halls, or government services centers. In general, they also should not be located in public libraries, since most libraries already have Internet access through which the public can find all the kiosk content and more.

If a kiosk is not meeting the performance standards established by the Department, if the owner of the current space decides not to retain the kiosks, or if there is some other reason to move a kiosk, the Regional Director and/or Field Office Director is responsible for finding a new location. The Regional Web Manager for that region is responsible for coordinating the process.

Coordinating Moves

The steps for coordinating a move are these:

- The Regional Web Manager works with the Field Office Director to identify a site. You'll need to contact the managers of the site to determine costs/requirements that would be involved. Your review of the site should include the number of hours the facility will be open and the number of people who normally use the facility during an average week. Ideally, we're looking for locations that are open 7 days a week. It must have some evening hours and Saturday hours, or it will not be approved
- Once you find a site, the Regional Web Manager should notify the Departmental Web Manager for Field Operations, who will review and approve the new location.
- After the new location is approved, the Regional Web Manager should notify the local office administrative staff (or - if there is no local admin staff - contact the appropriate ARD). The administrative staff/ARD will work out the lease agreement. The administrative staff/ARD is responsible for:
 - Working out the details of the lease. As a rule, HUD will pay no more than \$300 per month to rent space for a kiosk. In rare exceptions, we may approve rentals up to \$600. Anything over \$300 per month must be approved by the Departmental Web Managers. If the lease amount is greater than \$2,500 annually, the administrative staff will work through GSA to execute the lease. Typically, when GSA is involved, it will take longer to execute the lease agreement; so that needs to be considered in planning.
 - Executing a Memorandum of Understanding with the owner of the facility,
 - Ordering and paying for the phone line for the kiosk, and
 - Making arrangements and paying for installation of power sources, if needed
- Once the lease is signed and phone and power lines are ordered, the local administrative staff/ARD will notify HUD's contractor - Eagle Collaborative Computer Systems - who will schedule the move. Eagle will need a point of contact at the site.

June 1, 2005

- The Web Manager should monitor all phases of the move process, making sure everything stays on track and resolving or elevating issues in a timely manner.
- A checklist for coordinating kiosk moves is available in **Appendix B**

Monitoring Maintenance

HUD has a contractor who maintains the kiosks, once installed. The contractor checks each kiosk regularly, refilling the paper and fixing any problems. If a kiosk is broken, the local office reports the problem to the Web Manager who in turn contacts the HITS desk and opens a STARS ticket.

The contractor sends regular reports on the status of kiosks (those that are down), and those reports will be sent to the Regional Web Managers.

Web Managers should monitor the performance of kiosks. If a kiosk is down repeatedly, look for the cause. If it's something in the control of the local office (e.g., placement makes it susceptible to damage, someone is unplugging it, maintenance contractor hasn't been monitoring it routinely), take action to resolve or elevate the problem.

Monitoring Use

Monthly statistics for each kiosk are posted on hud@work (on "Web Management, Inc."). Web Managers should check the statistics for the kiosks in their regions to make sure they are meeting the performance standards established by the Deputy Secretary. If a kiosk shows poor performance, the Web Manager should take immediate action to identify the cause (needs maintenance? needs publicity? Poor placement?) and resolve the problem.

Marketing

Kiosks - like all of HUD's web products - need to be promoted. Web Managers should work with their local public affairs staff to find creative ways to market the kiosks. Most kiosks have an LED display that can be programmed to promote specific content or initiatives. Web Managers should work with the Field Office Directors to use those displays effectively.

Managing Kiosk Content

Most of the content on the kiosks either is generic or is pulled from Departmental systems; however, Web Managers should review kiosk content periodically to ensure it remains current. Any problems should be brought to the attention of the Departmental Web Team.

Programming the Kiosk LEDs (Light Emitting Diodes)

Most of the kiosks have an LED display that can be programmed to advertise new content, local events, or other important information. In most cases, the LEDs can be programmed remotely, in Headquarters. The Departmental Web Team can take care of requests to program the LEDs remotely. Some of the kiosks – those that are LAN-based – must be programmed locally. Instructions for programming the LEDs are in **Appendix C**.

Kiosks Specifications

Here is pertinent information you'll need to know when finding locations for kiosks:

- The kiosk needs to have a dedicated phone line.

June 1, 2005

- The kiosk needs to have a dedicated outlet.
- The kiosks are approximately 7 ft. tall and 3 ft. in width and depth.
- Kiosks need a little extra room around the sides, for ease of maintenance.

SECTION 2: GENERAL PROCEDURES

F: MANAGING HUD PUBLIC COMPUTERS (HUD-PCS)

The purpose of the HUD Public Computers (HUD-PCs) is to provide access to the information on HUD's website to those who may not have Internet access and to assist HUD staff in answering questions from citizens who visit HUD offices.

The Departmental Web Team's Duties

The Departmental Web Team works with the Office of Administration and the CIO to maintain and manage the HUD-PCs. The Web Team works with Regional Web Managers to monitor maintenance and use of the HUD-PCs and to promote them.

Regional Web Managers' Duties

The Regional Directors, Web Managers, and Web Coordinators are responsible for ensuring that the HUD-PCs are maintained and promoted so that citizens are aware of this resource.

Regional Web Managers should ensure their Regional Directors are aware of the HUD-PCs and of their responsibilities for managing them. Regional Web Managers should train Web Coordinators to manage the HUD-PCs appropriately.

Determining the Location

The HUD-PCs must be positioned in a well-lighted area of the office, easily accessible to HUD guests and close to HUD staff who greet visitors. They should be in clear view of anyone coming into the office.

Web Managers should know where each of the HUD-PCs in their regions is located and should act promptly if HUD-PCs are placed in locations that are not conducive to their use by the public, working with the local FOD and Web Coordinator to relocate the HUD-PC to a more appropriate location.

If possible, post signs in lobby areas, letting the public know about the HUD-PCs and directing citizens to their locations.

The Right Equipment

HUD-PCs consist of the following:

- Dell Pentium computer
- 15 inch monitor
- Speakers
- Printer
- A mouse and a keyboard
- Cardboard front piece that is velcroed to the monitor
- Instructions on how to use the HUD-PC

If you encounter a HUD-PC that is missing one of these components, notify the Departmental Web Manager for Field Operations.

Instructing Local Staff

The Web Manager should ensure that the Field Office Director, the Web Coordinator, and the staff who sit close to the HUD PC are familiar with the websites and are ready to direct and assist customers in using the HUD PC.

Maintenance

Paper and ink cartridges are paid for and replaced by local office staff.

Maintenance of HUD-PCs is handled by HUD's computer support services contractor. If a HUD-PC isn't working, the Web Coordinator should call the HELP Desk in Headquarters and open a STARS ticket. The phone number for the HELP Desk is: 202-708-3300. The local staff also should contact the appropriate Regional Web Manager, to let him/her know about the problem.

Common problems that impact the use of HUD-PCs are:

- Poor placement - the public cannot see the HUD-PC when they come into the Office
- Poor maintenance - the HUD-PC is broken or the work area is dirty and unappealing
- Poor staff support - the local staff do not direct the visitors to use the HUD-PC or the local staff do not ensure that the HUD-PC are turned on each day
- Poor marketing - there are no signs advertising the availability of the HUD-PC and directing visitors to them

Web Managers should survey the local staff on a regular (at least quarterly) basis to identify any problems with the HUD-PCs. Chronic problems or problems that cannot be resolved by the Regional Web Manager should be elevated promptly.

SECTION 2: GENERAL PROCEDURES

G: MANAGING WEB CLINICS

Background

Web Clinics are free, one-day training courses that teach HUD partners how to create top-notch websites that deliver the services that HUD funds. Our goal is to help our partners create great websites to which we can link from our state pages, helping citizens find those local services that they want and need.

We've been doing these clinics since February 2000, and they've been a great hit. Not only do the clinics help our partners do something they want to do, they also create good will.

Clinics Agenda

Clinics cover 5 main topics:

- **What can you do with the web?** We share lessons learned in HUD's use of the web and show examples of partner websites that inform, provide services, and do work
- **Managing your website:** Practical tips for managing a website, including basic do's and don'ts and tips on making their websites accessible.
- **Marketing your website:** If they don't know about it, they won't use it. We give participants some low cost and no cost ideas for marketing their websites.
- **Creating your website:** 10 steps to developing their websites, complete with work sheets and a case study, as an example.
- **Tips and tricks for low-cost websites:** Finally, we tell them how they can get all the technical support for their websites - from computers to Internet service to graphics to web space - for free.

Participants receive packets containing complete notes on all the sessions. They also get the password to a special webpage that we've created for "Web Clinic Alumni." On that page, they can find the entire presentation we show at the Clinics, complete with links to the websites we show. That way, they can go back to their offices and review everything we covered. They also can download a free copy of our Web Clinic Wizard, an easy-to-use software package that lets them create a simple website in minutes

We've established a Web Clinics chat room, on the Alumni page, so that Clinic graduates can share ideas, seek peer reviews of their websites, and ask questions of the Web Team. We also maintain a Clinics alumni mailing list, and we use that list to let them know about new versions of the Web Clinic Wizard, upcoming clinics, and other related news.

Departmental Web Team's Duties

Members of the Departmental Web Team and designated Regional Web Managers teach web Clinics. Clinics are scheduled around the country, normally in HUD Field offices. The Departmental Web Team coordinates logistics with the appropriate Regional Web Manager and the local HUD Field Office Director. The Departmental Web Team provides all training materials.

Scheduling Clinics

The Departmental Web Team schedules the clinics on an annual basis. The schedule is coordinated with the Assistant Deputy Secretary for Field Policy and Management and with the Director of ODOC. Normally, we conduct 12-15 clinics each year. In deciding which cities to schedule for clinics, the Web Team considers

- HUD offices that have not already had a Clinic
- HUD offices that have not hosted a Clinic in at least 2 years
- Major cities or target areas (e.g., SW border) where Clinics could reach a substantial population of HUD partners
- Requests by HUD managers (if any)
- Travel costs

Normally, we try to make sure we cover the country, hitting as many different regions as possible.

The clinic schedule is posted on the web clinics page on hud.gov and distributed to Regional Web Managers and to Regional Directors.

Program managers can request special web clinics for specific customer groups, for example PHAs, in conjunction with conferences or other HUD meetings.

Trainers

Web Clinic trainers are designated by the Departmental Web Manager. To stay effective, trainers need to conduct a clinic at least once every 2-3 months. If they go longer than that, they begin to get a rusty. We want every Clinic to be the best HUD has to offer. So teams and schedules should be organized so that trainers do at least one clinic every 2 months. Trainers use the standard “script” for the clinics, ensuring that every clinic participant gets the same basic information; however, trainers also throw in their own personal experiences, to help underscore the points being made.

Duties Involved in Managing Web Clinics

Departmental Web Team:

- **Coordinate training materials:** Though the materials in the packets are time-tested and proven, we do occasionally update them. Periodically poll the trainers to identify any changes that they’d like to make. Changes must be approved by both of the Departmental Web Managers. Update packets and the Web Clinic Alumni website accordingly.
- **Monitor evaluations:** Collect and review evaluations from all web clinics. Identify any trends – both positive and negative. Positive trends might indicate a “best practice” that all trainers could adopt. Negative trends may indicate a need for more training for a trainer or other appropriate action.
- **Maintain the Web Clinics page on hud.gov:** Periodically review the content of the Web Clinics page (www.hud.gov/webclinics) to ensure that it is current and accurate.
- **Maintain the Web Clinics alumni page on hud.gov:** Monitor the Web Clinics chat room, make sure that handouts and the presentation are current, and add links to good examples of websites done by our clinic alumni.

- **Maintain the Web Clinics instructions:** Periodically review the information and instructions in this document to ensure they are current and accurate
- **Communicate Web Clinics successes:** Periodically summarize Web Clinic successes to include in State of the Web, accomplishments reports, the Web Team work plan, and other reports.
- **Respond to queries from past and future clinic participants:** Respond to or route comments and queries, both via email and phone, from Clinic participants. Typical queries are: "I've finished my website – would you please review it?" and "I'm trying to use the Web Clinic Wizard, and I need help."
- **Appendix D** is a checklist for the Web Team to use to manage clinics.

Regional Web Managers

- **Coordinate With Local Staff:**
 - Before we announce each clinic, you should contact the Field Office Director to let him/her know about the clinic and to contact the local Web Coordinator to go over the duties associated with the Clinic.
 - Make sure to link to the Web Clinics page from the front page of the appropriate state page.
 - Follow up with the local liaison to ensure that all activities specified on the checklist are completed.
 - Work with the Field Office Director to develop an invitation list. Though the Clinics are advertised on the website – and registration may be done via email – the FOD will need to send invitations to local partners and prospective partners. You may want to develop a cover memo from your Regional Director to include with the flyers, encouraging partners to participate in the Clinic.
 - Monitor registration. If responses are low, the week prior to the Clinic, work with the FOD to mobilize the local office staff to call their partners and invite them personally.
 - The day before the Clinic, contact the local liaison to double-check that all logistics have been planned. If the local office manager is acting as "host," contact him/her to reconfirm.
 - If at all possible, Regional Web Managers should attend the Clinics in their jurisdiction, to assist the Clinic training team and to establish relationships with the local partners.
- **Follow Up to Clinics:**
 - 3-6 months after the Clinic, work with the local Web Coordinator and FOD to see if they would like to organize a follow up "show and tell." All they need is a room with an Internet connection, a computer, an InFocus, and a screen. They can invite their clinic participants to come together again to show what they've accomplished. Invite each participant to show his/her site, and let the other participants offer their critiques. It's as simple as that! If you can be there to run this session yourself, that's even better.
 - Provide feedback to the Field Office Directors and to the Regional Director about your Clinics. Brief them on the number and responses of participants. Show them the websites developed as a result of the Clinic. Show them websites of partners who don't come to the Clinics and urge them to encourage those partners to attend a future Clinic.
 - Show managers the value of helping our partners create good public service websites.
 - Let the Departmental Web Manager for Field Operations know how your follow up sessions go.
 - Provide URLs of websites that might serve as good examples for future Web Clinics.

Web Coordinators

Appendix E outlines procedures for the local Web Coordinator.

Some tips on Clinics

- When developing the invitation list, don't stop at the borders of the local office jurisdiction. The most successful Clinics are those to which partners were invited from neighboring Field office jurisdictions, as well. Contact the FODs from adjacent Field offices and encourage them to invite their partners to the Clinics.
- Based on experience, the ideal size for a Clinic is 50 participants. But we have done Clinics for as many as 125 participants - and certainly we don't want to turn folks away! We normally see a 20-25% "no show" rate at Clinics (when it's free, folks feel less compelled to tell you they've changed their minds), so over-book.
- Clinics work best - and become cost-effective - when there are at least 20 participants. If you are not able to attract at least 25 registrations 3 days before the Clinic (keeping in mind that you are likely to lose 25% of those who registered), we may cancel the Clinic.
- Though the Clinics are for HUD partners and prospective partners, we typically don't turn other folks away, as long as there is space in the room. Who attends, though, is your call. Just use your own judgment.
- If HUD staff would like to attend the Clinics, they are welcomed to observe, as long as they don't displace partners who would like to attend. Please remind the HUD staff that the Clinics are aimed at our partners - not at them.

SECTION 2: GENERAL PROCEDURES

H: MANAGING MARKETING AND OUTREACH

One of the most important responsibilities we have as Web Managers is marketing HUD's web products to their intended audiences. Our web products are just like any other kind of product – if people don't know about them, they won't use them. So you have to get the word out. And while you're doing that, you can collect some good feedback from our audiences to help us make our web products better.

Fortunately, we don't have to do this alone. In fact, we employ the "Tom Sawyer" model and piggyback on the efforts of others to accomplish most of our marketing responsibilities.

Departmental Web Team Duties

- All members of the Departmental Web Team share responsibility for marketing and outreach, as do all Web Managers in Headquarters and the Field.
- The Departmental Web Team develops and oversees the marketing and outreach strategy, making annual adjustments as needed.
- The Departmental Web Team develops, purchases, and distributes promotional supplies, including brochures and other marketing items.
- The Departmental Web Team conducts focus groups as opportunities occur.
- The Departmental Web Team trains Web Managers on how to do marketing and outreach.

Web Managers' and Web Coordinators' Duties

All Web Managers and Web Coordinators – both in Headquarters and the Field – are responsible for marketing HUD's web products and reaching out to our audiences to let them know what we have and bringing back what we learn from them, in that effort.

Strategy

At HUD, we established a 4-part marketing strategy that's worked very well for us.

1. Go the audience

People aren't going to come looking for you – you have to go to them. We encourage Web Managers throughout the Department to look for local events where lots of people will be – street festivals, county fairs, home and garden shows – any event where you could set up a table to tell people about our websites and our kiosks. We also encourage them to contact our partner organizations and offer to demo the websites for them.

We encourage the Regional Web Managers to contact other public service organizations in their area (other federal, state, and local agencies; housing related nonprofits; etc.) and see if they can organize a "Public Service Web Night" at a local school or shopping mall, where each organization can demonstrate its website for the public. We encourage Web Managers to work with their Public Affairs Officers to find inexpensive ways to promote HUD's web products, such as asking for a free ad on the local public access cable TV

stations or local radio stations. Radio stations are required to broadcast a certain number of public service announcements (PSAs) and are always looking for PSA fodder.

And again – we try to tell Web Managers to use the efforts of others to help us with our marketing. If the Housing staff are setting up a booth at the State Fair, ask them to put out a stack of web brochures and promotional items at the booth.

2. Leave a calling card

OK – so you’ve gone out to the audience and told them about your website. Now what? Give them something to remember us by. We’ve got great brochures on hud.gov, kiosks, and espanol.hud.gov. We try to make sure each of the Field Offices has a stack of them, and we encourage program managers to take brochures with them to meetings and presentations. If we’re aware of meetings or conferences targeting a specific group (e.g., senior citizens), we urge the staff to print out copies of pertinent information from our websites (e.g., “senior citizens” page) to hand out

We purchase promotional items, in addition to the brochures, to help Web Managers and other HUD staff spread the word about our websites.

We urge all HUD managers to make sure our web addresses (both www.hud.gov and espanol.hud.gov) are on everything - stationary, business cards, fax cover sheets, with the office address in the local phone books, HUD ads in the paper or on TV...everyplace we put our address or phone number, we should include our web address.

We also encourage them to put the web addresses in their voice mail messages...“we can’t take your call right now but you might want to check our website at www.hud.gov.”

3. Train the staff

If HUD staff know how to use HUD’s websites, they will be able to help us market them. So that’s what we do.

We encourage Web Managers throughout the Department to hold periodic demonstrations in their offices to show employees what’s new on the sites and how to use the sites to their advantage.

And we try to tell HUD staff, on a routine basis, how our websites are being received. We share the good news – the more excited HUD staff are about HUD’s web products, the more excited they’ll be to promote them.

Be sure to tell staff about the “aliases” to our most used web content (see **Appendix F**). These URL shortcuts can be a great advantage to marketing and training efforts.

Additional guidelines on training staff are available in **General Procedures 14**.

4. Listen to the audience

Part of marketing is collecting feedback from our audiences so we can improve our products. And one of the most important skills every Web Manager needs is the ability to listen to our audiences. We have found that, if we listen, our audiences will tell us exactly what to do with our websites.

There are lots of ways to “listen.” We monitor the webmail that comes in. If people are asking the same questions over and over, maybe we need to make that piece of information more prominent on our website. Or maybe we need to explain it better.

We monitor the statistics. Are people visiting the pages we would expect them to visit? If not, maybe we need to make those pages more prominent.

When we do marketing events, we demo the website and then ask for comments and feedback. People love to be asked for their opinions.

We do focus groups every chance we get. We’ve found that we can do a very effective focus group, in about a half hour, anywhere we can find a handful of people to listen. That’s true both inside HUD, where we invite employees to tell us about hud@work, and outside HUD, where we look for feedback on hud.gov and espanol.hud.gov.

Focus groups really kill two birds with one stone. First, they give us an opportunity to tell people about our websites, show them around a bit, and tell them how we’ve got it organized. Second, they can produce some great ideas – things we may not have thought about.

Focus groups can be very general – just ask for general impressions. Or we can tailor to some specific problem that we’ve been having. Maybe there’s a particular page that just isn’t working for us. Sometimes a focus group can give us the perfect inspiration for fixing the problem.

We do try to keep the group small, so people have a chance to voice their opinions. We take notes, to show them that we care about what they said. And assure them that they won’t hurt your feelings – you honestly want to know how to make the product better for them.

You should hold focus groups with the audiences you are targeting for that particular web product. So if you want feedback on hud.gov, set up a focus group with people outside of HUD. If you want feedback on hud@work, set up a focus group with HUD employees. Guidelines for conducting focus groups are available in **Appendix G**.

When you conduct focus groups, be sure to share what you learned with your peers and with the Departmental Web Team.

Remember – use the “Tom Sawyer” approach, as you make your marketing plans. Find ways to get other HUD staff to do your marketing for you. But be sure to take credit for every marketing effort you make, whether you did it personally or not!

SECTION 2: GENERAL PROCEDURES

I: PROVIDING GOOD CUSTOMER SERVICE THROUGH WEBMAIL

Customer Service Standards

Web Managers have two customer groups: internal customers (HUD managers and staff) and external customers (citizens and business partners)

Standards for Serving Internal Customers:

- Understand what they do and who their customers are, so you can help them find ways to use the web to do their work
- Educate them so they know how to use the web to do their work
- Promptly respond to their questions (1 business day) - answer internal questions first
- Update customers regularly on the status of your efforts for them
- Let them know when you've completed something for them – don't make them have to ask
- Help them enhance their own requests so they will be completely satisfied with the results
- Acknowledge their accomplishments
- Always show a "can-do" attitude – if you can't help them try to get them to someone who can - never say "that's not my job"

Standards for Serving External Customers

- Respond to email in a timely manner (meet the Departmental standard)
- Audit email for timeliness and quality. Elevate issues about timeliness and quality of email responses to management
- Understand what they want and need and make sure we respond
- Refer when we can't answer a question ourselves – never tell them "that's not my job" or "I can't help you"
- Print information and mail to people without Internet access
- Market what we have available on the web so our customers can find it

Handling Webmail

Email that comes in through the website ("webmail") is one of the primary means for listening to our audience and for providing good customer service.

HUD's policy is that we try to respond to webmail within 2 working days. If research is required, we may take up to 2 weeks. If it's going to be longer than that, we need to let the requester know approximately how long it will take.

People who use HUD's website may report potential inaccuracies in data that is presented on the website, via the webmail system. In these cases, Web Managers or their designees must forward the message to the Office of Administration, for processing under the requirements of Section 515 of the Treasury and General Government Appropriations Act for Fiscal Year 2001 and commensurate guidance from OMB "to ensure and maximize the quality, objectivity, utility, and integrity of information disseminated by Federal agencies." If inaccurate data is found on the website, the Web Manager must work with the appropriate office to correct the data as soon as possible.

Departmental Web Team Duties

The Departmental Web Team establishes procedures for handling webmail and monitors webmail management Departmentwide.

The Departmental Web Team forwards or responds to webmail addressed to the generic “webmanager.hud.gov.”

Duties of All Web Managers

Because we receive - Departmentwide – thousands of webmails each month, you need to create and train a network of people throughout your organization to respond. The good news is that many of the messages that we get fall into just a few categories, and we have developed some [boilerplate responses](#) that you and your network can use.

It is your responsibility to ensure that the people in your network understand the importance of good customer service, that they know the proper tone to use to respond to webmail, and that they keep you informed of significant trends or anomalies.

Responding to Webmail

- Response to webmail should be conversational, as if you are speaking in person, and it always should be positive and helpful in tone. Whenever possible, we try to give the person a straight answer or provide a suggestion about where the person can get an answer. We never say, “sorry, can’t help you” – we always try to offer a suggestion or next step.
- If webmail comes to you inappropriately, just route it to the proper office, copying the requester so he/she knows where the message has been sent. If you can identify where the person lives, route it to the appropriate state webmail box (for example: AZ_webmanager@hud.gov). If you can't identify where the person lives, route it to the proper program Web Manager in Headquarters.
- If the requester has special circumstances – for example, person with disabilities - the Department may have specific experts who could respond best. Contact the Departmental Web Team if you are unsure to whom to refer a webmail.
- Use the “Common Questions” responses on www.hud.gov and “Standard Responses to Webmail” section of HUD@work to form webmail responses. Keep copies of all emails received and responses sent. You may be able to use prior responses to answer questions quickly.
- If you receive a lot of webmail on the same subject, develop a standard response and share it with your peers. Forward it to the Departmental Web Team to include in our master list of boilerplate responses.
- We do not attempt to “control” webmail – it would slow down the response. However, Web Managers should monitor response times and the quality of responses on a periodic basis, to make sure we are providing good customer service through our webmail.
- Webmail that was misdirected to HUD should be forwarded to the mailbox: nothud@hud.gov. Webmail coming to that address will be sent to USA Services, which serves as a clearinghouse for misdirected questions.

- Get it right the first time. In a quick survey of webmail requesters, we learned that if it took more than one exchange to pin down what the requester wanted, the requester was not pleased with the response received.
- Use an appropriate greeting for every email response you send. Use the requester's name in your response, if possible. In our survey, when the reply included some form of greeting (i.e., "Dear Ms. Smith" or "Dear Bill"), the requesters were pleased with the response they received.
- Take time to add background information or "next steps" to your reply. Requesters appreciate your taking the time to give them a thorough response. Whenever possible, point out places on our web pages where the requester could locate helpful information.
- Anticipate additional questions and respond before they are asked. Many times, requesters don't know exactly what to ask. So take the time to think through what the requester really wants, and provide a comprehensive response that anticipates questions and additional information needs.
- When sending URLs in email responses, remember that we have some easy-to-use "aliases" for our most requested web pages. See **Appendix F**.

Web Manager Mailboxes

To facilitate quality customer service, we've established "generic" email boxes for each state. The address for each of these mailboxes follows the same format: two letter state abbreviation, followed by Webmanager@hud.gov (for example, AZ_Webmanager@hud.gov). The Regional Web Managers can access each of the generic mailboxes in their Regions and can request rights for others in the Region to respond to the webmail that comes into those boxes. To add or delete access rights for generic state mailboxes, the Regional Web Manager must send an email to the Departmental Web Manager for Field Operations, who submits the request to the CIO.

Many of the Headquarters Web Managers have found it effective to establish "generic" webmail boxes for their program areas. That way, several staff can be involved in answering webmail. To request a generic webmail box, Headquarters Web Managers must contact their Office Technology Coordinators (OTC).

SECTION 2: GENERAL PROCEDURES

J: MANAGEMENT CONSULTING

One of the keys to success of any Web Manager at HUD is to know and understand the goals, objectives, and issues facing HUD managers and then help managers use the web to address that work. To accomplish that role, Web Managers must be effective management analysts and consultants.

Web Managers need to use analytical knowledge and skills to evaluate management initiatives and issues – often on the spot – and be prepared to articulate potential web-related solutions. This is part of our entrepreneurial role – we need to get out there and stir up new business. And to do that, we have to look for opportunities to get “face time” with managers and then use that time to show them we understand their problems and that we have web-based ideas that can help them. Our mantra: never say “I can’t help you” to a manager.

Departmental Web Team Duties

The Departmental Web Team briefs top executives about HUD’s web products and the management opportunities they provide by setting up appointments when new executives arrive; by making presentations at Executive Management Meetings, Field Management Meetings, and other major management meetings; and by meeting with key staff either at their request or to promote new ideas.

The Web Team is responsible for training Web Managers how to be effective management consultants.

Duties of All Web Managers

- Generate opportunities to meet with managers.
 - Target both the top political officials and top managers in your organization and the managers at the operational level – branch chiefs, team leaders, and others
 - Examples of ways to meet with managers:
 - Schedule meetings with them to brief them on web management objectives and propose actions they may want to take
 - Send ideas for ways they can incorporate web-related initiatives into their Management Plans
 - Write memoranda for your organization head to send to managers, outlining web initiatives and inviting personal consultation
- Respond to opportunities to meet with managers
 - Brief managers at regular meetings such as staff meetings and staff conference calls
- Keep other Web Managers informed of outcomes that could be applied across organizational boundaries – share the knowledge
- Educate yourself on management issues and develop ideas to address management goals and problems via the web
 - Be familiar with the Department’s strategic goals, annual management plans, news releases announcing new initiatives, and other Departmental reports. Stay aware of current initiatives and priorities
 - Brainstorm with the Departmental Web Team and other Web Managers ways the web can be used to support those initiatives and priorities
 - Identify opportunities to meet with managers to present options

June 1, 2005

- Follow up on all promises made. Take notes when you meet with a manager. Make sure you communicate any promises made to everyone who needs to know. Follow through.

SECTION 2: GENERAL PROCEDURES

K: WEB MANAGEMENT TRAINING

An effective web management organization needs well-trained players, throughout. Training is an ongoing process.

Departmental Web Team Duties

The Departmental Web Managers are responsible for planning and directing training for HUD's web management organization.

Training includes:

- Keeping Web Managers and Web Coordinators up-to-date on current and future initiatives and strategies
- Providing information or courses to develop specific skills, such as writing and editing web content and doing public presentations
- Demonstrating and practicing new processes, such quality control reviews, and
- Developing other knowledge, skills, and abilities that will help the Web Managers and Web Coordinators perform their duties more effectively and create a cadre of potential candidates for succession.

The Departmental Web Team also is responsible for providing technical training to Headquarters staff and Regional staff on using HUD's web templates and content management systems, as needed.

Departmental Training

The Departmental Web Team provides training in 4 basic ways:

1. Counterpart meetings
2. Conference calls
3. Written communications:
 - Webwise (our Web Management newsletter),
 - "Web Management" – the resource guide for HUD Web Managers and Web Coordinators on hud@work; and
 - Bookshelf 15: Web Management on www.hud.gov, our compendium of public information on HUD's management of the web.
4. Provide information about outside training opportunities (particularly interagency training sessions).

Counterpart Meetings

- Counterpart meetings are held routinely (normally 2-3 times each year) to bring the Departmental Web Team, the Headquarters Web Managers, and the Regional Web Managers together to work on common issues and to receive training. The objectives of Counterpart meetings are:
 - Bring everyone up-to-date on plans and directions for the future, including participation in interagency web content management initiatives;
 - Conduct training on critical skills in areas such as writing and editing web content, assessing the usability of HUD's web pages, and analyzing customer satisfaction;
 - Work together on plans for improving HUD's web products;

- Build personal relationships and networks across geographic and organization boundaries, key to keeping our organization strong; and
- Develop strategies to ensure that HUD's websites meet and exceed requirements established by the Office of Management and Budget.
- Counterpart meetings involve only the officially designated Web Managers in the key organizations in Headquarters and the 10 Regional Web Managers.
- No substitutes are allowed. One of the major objectives of counterpart meetings is to build the Web Manager Team. If the players are constantly changing, it's hard to build a team.
- Web Manager meetings are most effective when held outside of the Washington area, where there's less temptation or opportunity to be side-tracked by ongoing business. In fact, the best location for Web Manager meetings has proven to be in a Field Office training room. The benefit of meeting in a Field Office is that, not only does it get Web Managers out of their own locations, it also lets them interact with Field Office staff at another location. It's cheaper to use HUD facilities than to rent meeting space.
- As possible, the meeting agenda includes opportunities for interaction between the Web Managers and the local staff. At a minimum, the FOD is invited to welcome the group.
- Web Manager meetings normally run 3.5 days, with a travel day on either end. Since these are the only opportunities for face-to-face interaction during the year, it's important to use the time to do training and other sessions that require presence.
- When developing the agenda, it's a good idea to set aside some time for the Regional Web Managers to meet separately, since this is the only time they get to meet face-to-face as a group.
- If possible, it is good to include a tour of local HUD efforts (202s, Youthbuild programs, HOPE VI projects, etc.), and discuss how they can be featured as "good stories."
- One of the major objectives of counterpart meetings is to build relationships among the Web Managers, so the web management organization can remain strong. Thus, the meeting agenda includes multiple opportunities for Headquarters and Regional Web Managers to work and socialize together.
- One of the three counterpart meetings each year should include a 2-day session for Web Coordinators, if funding is available. Web Coordinators are the unsung heroes in HUD's web management organization, and they – too – need to be trained and to build relationships across organizations.

Conference Calls

Most Web Manager coordination is done through conference calls. Even in Headquarters, where Web Managers theoretically are all in one place, conference calls have proven to be a more effective way to "meet" than in-person meetings.

- The Departmental Web Managers normally conduct weekly conference calls with their respective groups: Headquarters Web Managers meet with the Departmental Web Manager for Headquarters Operations; Regional Web Managers meet with the Departmental Web Manager for Field Operations. Departmental Web Team members participate in both calls.
- As needed, conference calls are held with the combined groups, to discuss major issues or to receive briefings.
- Conference calls normally run 1-2 hours, with an agenda set in advance. Calls conclude with "roundabouts" – individual reports from each Web Manager on current activities and issues. Roundabouts help Web Managers trade tips and ideas.

Written Communications

The Departmental Web Team is responsible for publishing these three written communications, which help Web Managers and Web Coordinators do their jobs.

- **Webwise:** *Webwise* is HUD's web management newsletter, published by the Departmental Web Team every 2 months. It provides updates on initiatives, training opportunities, recommended reading, and other useful tips for Web Managers and Web Coordinators. *Webwise* is posted in the "Web Management" section of hud@work.
- **"Web Management" (hud@work):** The "Web Management" section of hud@work documents procedures and provides information for HUD Web Managers and Web Coordinators that should not be public. It incorporates links to web management documents on Bookshelf 15 of www.hud.gov, to provide "one-stop shopping" for HUD Web Managers and Web Coordinators.
- **Bookshelf 15: Web Management (www.hud.gov):** The "Web Management" section of www.hud.gov was established to provide documents, reports, and other important information about the way HUD manages its web products to Web Managers at other agencies and to the public. In addition to official policies and procedures, Bookshelf 15 holds a history of HUD's web products, links to articles about HUD's web products, and job descriptions of HUD's Web Managers. If information can be public, we put it on Bookshelf 15. If it cannot be public, it goes on hud@work.

Outside Training Opportunities

Through participation in interagency efforts (such as the Web Content Management Working Group), the Departmental Web Managers stay on the lookout for low-cost and no-cost training opportunities for HUD Web Managers and web coordinators. When we find a good opportunity, we share it via email, conference call, and/or **Webwise**.

With increasing emphasis on identifying and using common content, eliminating duplication across federal websites, and collaborating on content across government, it is essential that all HUD Web Managers look for opportunities to work with their counterparts in other agencies. Training sessions are a great way to make these connections.

Web Manager Duties

Headquarters and Regional Web Managers are responsible for training their Web Coordinators and any other staff who assist in web management operations on a routine basis (for example, people who respond to webmail). Training should include:

- Training on *HUD's Web Policies, Publication Procedures And Style Guide*, and *HUD's Web Management Operating Procedures*.
- Routine updates and briefings for Web Coordinators, through meetings or conference calls
- Routine individual meetings and follow up with Web Coordinators to identify specific problems and answer questions
- Routine email updates to brief Web Coordinators about specific plans and activities within the jurisdiction
- Routine refresher sessions with anyone in the jurisdiction who is responding to webmail.

SECTION 2: GENERAL PROCEDURES

L: TRAINING HUD STAFF

The more time Web Managers spend teaching HUD staff how to use the web, in general, and how to use our websites, in particular, the more help you'll get doing your job. When HUD staff know how to use the websites, they can help each other and help our customers find the information they want and need to solve their problems and achieve their goals. In addition, holding training sessions with staff can help you learn more about what works – and what doesn't – with our websites. And training sessions may spawn brainstorming that will produce new and better ways to communicate with our audiences.

Departmental Web Team Duties

The Departmental Web Team works with Web Managers to identify and plan training for HUD staff, both in Headquarters and the Field. When possible, the Departmental Web Team conducts training for HUD staff.

Responsibilities of All Web Managers

All Web Managers are responsible for providing regular training to the employees in their jurisdictions.

Setting Up Training Sessions

Staff training sessions can be formal or informal – try both.

- Go visit the managers in your organization or send them email, offering to conduct a training session for their employees on how to use the website to help customers.
- Schedule a meeting room and send out a note to all the employees in your organization saying you'll have ½ hour training sessions the first Monday of each month. Give each session a theme (e.g., how to use search engines) or just do general drop-in sessions.
- Find out when organizations are having staff meetings and then ask the manager if you could do a quick 10-minute presentation on how to use the website, at the end.
- Send out a note to the employees in your organization and offer to answer their questions by email. Sometimes that's a good way to strike up a relationship with someone who needs a little more training.

Be sure that you end each session encouraging employees to help one another use the web. And be sure you tell employees to promote HUD's web products!

Tips and How To's

- Encourage questions and be ready for anything – you cannot assume staff have **any** knowledge of the web or HUD's sites. Be ready to address any and all needs. You may want to consider creating different levels of instruction – beginner and more advanced.
- Think about your audience beforehand, and provide resource lists with direct links to useful materials for that audience.
- Be ready – you'll probably get both questions about the web and basic technical questions that have nothing to do with the web. Know how to direct staff to the answers, if you can't provide them.
- Encourage staff to contact you later with questions or ideas

June 1, 2005

- You want to encourage ideas and suggestions. You'll probably get suggestions for things we've already tried or things that already are in the works...but you also may get some exciting new ideas.
- If you get a question that you can't answer, be honest enough to say you don't know. But try to help them find the answer.
- Yes - you will get complaints. You can't please all the people all the time. Be open and honest in your response - and don't promise what can't be delivered.
- Be ready to provide general information on design and navigation as well as information specific to an employee's job. Provide resources on hud.gov and [HUD@work](#) that all employees can use – glossaries, bookshelves, etc.
- Encourage employees to think about what they can do differently – many staff don't realize how many things there are that can make their job easier and more interesting and save time (making copies, etc.)
- Be ready to toot our own horn a bit – staff usually have no idea about the good work we do and use that as a segue to say hud.gov is their site and it serves to show the good work they do for the public
- Be very familiar with our sites – internal and external.
- Use every training session as a focus group. Pay special attention to what staff need or can't find or wish, or...

You can find a sample agenda for a staff training session in ***Appendix H***.

SECTION 2: GENERAL PROCEDURES

M: INTERAGENCY EFFORTS

HUD Web Managers participate in interagency efforts, as appropriate, including cross-agency websites and interagency working groups that are looking at web content. In addition, all HUD Web Managers are encouraged to participate in the Web Content Managers Forum, a group of government Web Managers who meet monthly to discuss issues common to all and who share lessons learned and best practices through a listserv.

Web Content Managers Forum

The Web Content Managers Forum is a group of government Web Managers who are responsible for the content of our agencies' websites. Members come from Policy, Communications, Public Affairs, CIO, and Deputy Secretaries' staffs or other parts of the management arms of our agencies. HUD convened this group in October 2000 as a means for sharing ideas, challenges, lessons learned, and best practices in managing the content of government websites. Now, there are more than 700 members worldwide.

The Forum holds monthly meetings - on the third Thursday, from 10 – 11 ET. Normally, meetings are held via telephone so that members from all over the world can participate. At the meetings, Web Managers discuss issues that everyone is facing; exchange ideas, best practices, and tips; and develop strategies for solving problems. The Forum also has a very active listserv, which members use to seek suggestions, share successes and resources, and discuss problems.

The Forum is open to web content managers who are government employees, from any level of government: federal, state, and local. Since the purpose of this group is to exchange ideas among colleagues, we do not admit contractors or other private individuals to join.

The Forum is a great way for HUD Web Managers to learn what's going on in other government web management organizations. It's a real training opportunity. We encourage all HUD Web Managers to join the Web Content Managers Forum. To join, simply send an email to: webmanager@webcontent.gov.

Interagency Working Groups

In FY 2004, the Interagency Committee on Government Information (ICGI) established the Web Content Management Working Group to help them develop recommended web content policies, in compliance with the E-Gov Act of 2002. The Working Group wrote a highly-regarded report; and in December 2004, OMB issued new web management policies that reference the report and the website established by the Working Group to provide guidance on implementing the OMB policies and to provide other information and resources that government Web Managers need (the Web Content Managers Toolkit at www.webcontent.gov).

The Working Group is continuing to define common practices that can make U.S. Government websites the most citizen-focused and visitor-friendly in the world. It has established a number of Task Groups to work on such issues as usability, metadata, and governance. Members of the Web Content Managers Forum – the primary stakeholder group for the Working Group – can participate in most of the Task Groups. We encourage HUD Web Managers to get involved. To get involved, contact the Departmental Web Managers.

June 1, 2005

Cross-Agency Websites

A number of cross-agency websites have been developed among government agencies to help the public find information around topics and audiences. FirstGov.gov maintains a list of the known active cross-agency websites.

All participation on cross-agency websites must be coordinated with the Departmental Web Team. Though subject matter experts may be the primary HUD representatives, Web Managers should be aware of and monitor any cross-agency websites in which their organizations are involved. We want to ensure that HUD is represented by appropriate staff, that we don't make promises we can't keep, and that we feature links to any cross-agency websites in which we participate.

Cross-agency websites must comply with all laws, regulations, and policies governing federal public websites.

Webcontent.gov

One of the best ways to monitor interagency efforts and to connect with other government web managers is by visiting the Web Content Managers Toolkit (www.webcontent.gov) regularly.

SECTION 2: GENERAL PROCEDURES

N: MANAGEMENT PLANNING

HUD's web products exist to support achievement of HUD's mission and strategic goals; therefore, Web Managers and Web Coordinators throughout the Department should work with their organizations to identify opportunities to use the web in management planning.

Departmental Web Team Duties

- **State of the Web:** The management planning cycle for the Departmental Web Team normally starts in March or April, with the writing of the annual State of the Web Report. In that report, the Web Team documents the status and accomplishments in web management for the past year and the major goals and objectives for the next year. Plans include any actions required by law, regulation, OMB policy, or other official policy. The State of the Web Report is sent through the Director of ODOC to the Deputy Secretary, and it is posted on the Internet website on Bookshelf 15, with a prominent link on hud@work. The Web Team also prepares a transmittal memo for the Deputy Secretary, in case he/she wants to send the report to all Principle Staff, officially.
- **Management Plan:** In September, it's time to develop the Deputy Secretary's guidance for the Management Plan for the coming year. We write the section in the ODOC portion of the Deputy Secretary's guidance that pertains to web management. Normally, we simply copy the same goals and objectives that we've articulated in the State of the Web report.

We also work with Web Managers to identify some suggestions that they can provide in their management chains for ways to use the web to implement strategic goals (see **Appendix I**).

We encourage Web Managers throughout the Department to report significant web-related successes achieved through the Management Plan process, and we share those with the Director of ODOC.

- **QMR Standards:** Also in September, we revise and update the annual Quality Management Review standards related to web management. If there are changes, we make sure that the Regional Web Managers are aware of them. See Section 3-I for more information on the process and web management responsibilities. Current QMR web management criteria and evaluation methodology are in **Appendix J**.
- **Financial Management 5-Year Plan:** Sometime in the fall (it varies from August to October), the CFO asks the Departmental Web Team to update the "E-Government" section of the annual update to the Financial Management 5-Year Plan. This is a document that is required by OMB policy. Again, we use what we've written in the State of the Web to document accomplishments and describe the goals and objectives that we've laid out for the coming year.
- **Annual E-Government Report:** In December, the CIO is required to submit HUD's annual report on achievement of the E-Government Act. The Departmental Web Team reports on HUD's achievement of and compliance with the OMB Policy Memo M-05-04, Policies for Federal Agency Public Websites and any supplemental guidance or requirements mandated by OMB.

- **Annual Budget Process for the Working Capital Fund:** Working with the Office of Administration, the Departmental Web Team develops the annual budget for technical support of the Internet, intranet (for the Departmental Web Team and Regional Web Managers), kiosks, and HUD-PCs. Normally, the planning process starts in February. The Web Team develops the budget for ongoing maintenance of the content of the websites for the Web Team, the Regional Web Managers, and the small Headquarters Offices, for new development efforts for generic capabilities (for example, a new discussion software that all Web Managers could use), and for content support of the kiosks and HUD-PCs. The Web Team is the “project sponsor” for Internet/intranet and kiosks/HUD-PCs. Office of Administration staff are typically the GTRs and GTMs on support contracts.

Responsibilities of All Web Managers

All Web Managers are responsible for being involved in the Department’s processes for management planning.

- **Management consulting:** Web Managers should work with the managers in their organizations on an ongoing basis to help them use the web to meet goals and to solve problems.
- **Management Plan:** Web Managers should identify new ideas for using the web to meet Management Plan goals and take action to market their ideas with the managers in their organizations, during the annual Management Plan development process in the fall. If possible, Web Managers should get on Management Plan committees, where you’ll be able to consult and provide expert advice as Management Plan activities are being discussed. Web Managers should report significant web-related Management Plan successes to the Departmental Web Team so they can be included in the annual State of the Web report.
- **QMRs:** Regional Web Managers can use the QMR process as a opportunity to meet with managers to discuss new ways to use the web to make their operations more effective.

SECTION 3: MANAGEMENT CONTROLS

A: QUARTERLY CONTENT CERTIFICATIONS

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

About the Certification Policy

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

Process

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

June 1, 2005

- Certifications must be submitted to the Deputy Secretary, **through the Director of ODOC**. You may fax the certifications to the Director of ODOC at 202-401-8848. Be sure to fax a copy of the signed certification memo to the Departmental Web Team at: 202-708-1090.
- The Departmental Web Team will monitor certifications and report any outstanding certifications to the Director of ODOC.
- If, during the course of QC reviews, web pages are identified that are not current and accurate – after they have been certified – the Departmental Web Team may raise that issue with the organization Web Manager and/or the Director of ODOC.

SECTION 3: MANAGEMENT CONTROLS

B: POSTING RIGHTS

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

Posting Rights in Headquarters

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

- Housing: 6
- PIH: 5
- CPD: 4
- FHEO, Administration, CIO, CPO, CFO, CIR, EEO, OGC, OIG, Lead Hazard Control, ODOC: 2 each
- ALJ, Board of Contract Appeals, Faith Based and Community Initiatives, OSDBU, FPM, and PDR will get support from the Departmental Web Team technical support contractor.

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

Posting Rights in the Field

Regional Web Managers use contract support for most posting. Regional Web Managers do have a limited content management system that they can use to create and post features on the front pages of their Internet state pages and to add and update links on their topic level pages.

Each Regional Web Manager has an official back-up among the other Regional Web Managers. That back-up has rights to post content on behalf of the primary Web Manager. No one except the Regional Web Managers, the Departmental Web Managers, and the technical support contractor may have rights to or post content on the State pages.

Official back-ups for posting purposes are:

- Region I – Region VI
- Region II – Region VII
- Region III – Region VIII
- Region IV – Region IX
- Region V – Region X

For espanol.hud.gov and for hud@work, Regional Web Managers are supported by the Departmental Web Team's technical support contractor. In that case, Regional Web Managers submit requests through the Fieldtrak system.

General Rules about Posting Rights

- Posting rights are issued to individuals and may not be shared for any purpose.
- Any posting activity that results in losing files, making changes in directories other than those authorized, security violations, legal violations, rendering the websites or part of the

June 1, 2005

websites unworkable, or any other result that has a negative impact on the operation of HUD's websites will be dealt with promptly by the Departmental Web Managers and, as appropriate, the CIO, in consultation with the organization manager. Remedies may include required training, temporary suspension of posting rights, or permanent suspension of posting rights.

- All Web Managers are expected to know and abide by the policies and procedures for HUD's websites.

SECTION 3: MANAGEMENT CONTROLS

C: CONTENT QUALITY CONTROL

HUD's Departmental Web Team manages the Content Quality Control process, which ensures that HUD's web pages are reviewed routinely to ensure that they meet HUD's writing standards. Web Managers and others who develop web content and web pages should use the Quality Control rating form to review their pages before they post them.

Background

HUD is using its website to complete its mission and goals and serve the public; and it is important to have a process to ensure that the content is well-written, well-organized, and in compliance with Departmental web policies and publication standards. The Deputy Secretary already has established a quarterly certification process that requires HUD managers to certify that content is current and accurate. We also need to have a process that monitors the quality of the content, including compliance with Departmental requirements.

Overview of Process

The quality control process has five objectives:

- Be as objective as possible
- Be as helpful and constructive as possible
- Be routine
- Be carried out without new or additional resources
- Contain ramifications sufficient to ensure sustained, high quality web content throughout HUD's website

While the substance of the content (the "what") of HUD's website is "owned" by HUD managers, the presentation of the content (the "how") is the responsibility of Web Managers. Therefore, the quality control process will depend on "peer reviews," with Web Managers and web coordinators reviewing the pages of other Web Managers and web coordinators.

All reviewers will be trained by the Departmental Web Team, prior to conducting any reviews.

What Will Be Reviewed?

At the beginning of each year, the Departmental Web Team will establish a significant number of web pages to review.

Content to be reviewed will be identified in 3 ways:

- An established percentage will be the most visited pages for that organization. Some of these pages will be the same from review to review; but since these are the most visited pages, it is important that they be top quality.
- An established percentage of the pages reviewed each year will be selected at random from all the pages for that organization.
- An established percentage of the pages will be suggested by the Web Manager for that organization.

Review Teams

- Review teams will be 3-person teams drawn from all officially designated Web Managers throughout the Department
- Teams will include representation both from the Field and from HQ.
- Reviewers will never be assigned to review their own pages.
- The two Departmental Web Managers will not participate in routine reviews. They will handle disputes and appeals.

Review Process

- The Departmental Web Team will establish an annual review schedule, identifying review teams and review deadlines for each team. Deadlines will be staggered throughout the year.
- Each member of the team will review the same content so that there will be 3 different evaluations of the content.
- Each team member will complete an automated review form for each page reviewed. Reviewers will be encouraged to include specific comments and suggestions for ways to improve the content, particularly on ratings of 3 or less. QC reviews will focus both on compliance with HUD web policies and publication standards and on compliance with HUD's standards for writing for the web.
- The three evaluations of each page will be averaged to come up with an overall "score" for each page. The Departmental Web Team will review evaluations, identifying trends and anomalies.
- The Web Manager for the organization also will review the evaluations of the content for his/her organization, sharing the results with managers within the organization as appropriate.
- Deficiencies should be remedied within 1 month. A follow-up team, comprised of Web Managers, will spot check pages that score 44 (80%) or lower.
- Failure to correct deficiencies within one month will be reported to the organization head and the Deputy Secretary. Remedies could include temporary suspension of posting rights.
- A sample rating form is available in ***Appendix K***.

SECTION 3: MANAGEMENT CONTROLS

D: OPERATING IN EMERGENCIES

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

- **Terror Alert Level** - The terror alert level will be posted only on the front page of the national [hud@work](#) website. If specific regions or cities are at a different alert level, we will note it in that box. Employees only have to check one place - the front page of [hud@work](#) - to find out the alert level. The Departmental Web Managers will update the terror alert level based on a) notification from the Office of Security and Emergency Planning, b) notification from the White House or on the White House website, or c) notification from the Department of Homeland Security or on the Homeland Security website, whichever comes first. If the alert level is changed after normal working hours, the status will be updated on [hud@work](#) as early in the morning as possible, the next working day.
- **Departmental Information and Guidance on Security and Emergencies** - Important information about security and emergencies will be posted on HUD's Intranet ([hud@work](#)) by the Office of Security and Emergency Planning (OSEP). It will appear under the topic: "Emergencies and Security." That will serve as the primary information source for HUD employees about security and emergency procedures and protective measures. Any local emergency and security information posted on regional [hud@work](#) pages will be linked to the national Emergencies and Security page, so that all employees have just one place to look for this kind of information.
- **Local Information and Guidance on Security and Emergencies** - Regional Web Managers may create local Emergencies and Security pages on their Regional [hud@work](#) pages, provided that they coordinate all content with OSEP in advance and that all content is approved by the Regional Director, in advance. They must ensure that local information is linked to the Emergencies and Security page on the Departmental [hud@work](#) site. Content on local [hud@work](#) pages must be strictly local and must not duplicate information already on or appropriate for the national site.

Specific Duties of Web Managers

- Be familiar with the Department's procedures for posting content during emergencies,
- Work with your COOP representative and others in your organization to make sure they are aware of emergency posting procedures and that any other web aspects are addressed.
- Maintain a current list of phone numbers, home email addresses, and other contact information for key managers in your organization, Web Coordinators, fellow Web Managers, Public Affairs Officers or Coordinators, and any others who you might need to contact in an emergency.
- Inform/train Web Coordinators in your organization on procedures for posting information and other emergency plans related to the web.

Posting in Emergencies

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

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

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

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

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

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

The following approvals and notifications are required:

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

SECTION 3: MANAGEMENT CONTROLS

E: CONTENT COORDINATION

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

Required Coordination

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

SECTION 3: MANAGEMENT CONTROLS

F: BRAND INFRINGEMENT AND FRAUD

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

What to Look For

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

SECTION 3: MANAGEMENT CONTROLS

G: DATA ACCURACY

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

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

This applies to content, data, and links.

What Web Managers Must Do

- If inaccurate data is found on the website, the Web Manager need to work with the appropriate office to correct the data as soon as possible.
- If people who use HUD’s website report potential inaccuracies in data that is presented on the website, via the webmail system, forward the message to the designated email box maintained by the Office of Administration, for processing: quality_info@hud.gov.
- When putting up new web content – especially content that presents or includes data - make the manager aware of the OMB requirements and include appropriate clarification or disclaimers.
- When evaluating new links or reviewing existing links to outside websites, consider the requirements of the OMB policies and include appropriate clarification or disclaimers.

SECTION 3: MANAGEMENT CONTROLS

H: KIOSK PERFORMANCE STANDARDS

Kiosk Management Controls

Web Managers and the Departmental Web Team are to monitor monthly kiosk statistics. When a kiosk has fewer than 250 visitors per month for 3 consecutive months, the Web Manager will alert the Field Office Director and – together – they will decide whether to promote the kiosk or move it to a more favorable location. Kiosks failing to meet the average of 250 visitors per month for 6 months must be moved.

Procedures for moving kiosks are identified in ***Appendix B***.

SECTION 3: MANAGEMENT CONTROLS

I: QUALITY MANAGEMENT REVIEWS (QMRs)

Each year, the Office of Departmental Operations and Coordination, in cooperation with the Office of Field Policy and Management, develops a schedule of offices that will receive Quality Management Reviews.

Part of ODOC's responsibility during the QMRs is to look at web management operations in the office. We have developed very specific standards, measures, methodologies, and interview questions in four basic web management areas, to determine how effectively web management – and in particular, all the essential coordination – is being handled in the office being reviewed (see **Appendix J**).

- Web Content Management
- Promoting HUD's Web Products
- Web Training
- Managing Web-Generated Email

Departmental Web Team's Role

- The Departmental Web Team updates the QMR standards, measures, methodologies, and interview questions annually, prior to the start of QMRs.
- The Departmental Web Managers determine which QMRs need an indepth look at web management and, if necessary, assign a Web Team member to serve on the QMR team. For other QMRs, the Departmental Web Managers provide any appropriate background information and/or issues to examine to the ODOC team leader, prior to the review.
- The Departmental Web Manager for Field Operations responds to any questions from the ODOC team leader during the QMR, providing recommended actions as appropriate.
- The Departmental Web Manager for Field Operations follows up with the Regional Web Manager on any issues, ensuring actions for which the Web Manager or Web Coordinator are responsible are being taken.
- On occasion, the Departmental Web Managers may be asked to determine when an observation or issue should be closed.

Regional Web Managers' Roles

- Regional Web Managers should use the QMR process as an opportunity to educate Field Office Directors and other staff on the important roles and coordination necessary for effective web management.
- Get on the agenda of a Regional staff meeting early in the year to go over the web management QMR criteria and answer questions
- Train the Web Coordinators in your region on the QMR standards, and offer suggestions for ways to address all the standards.
- Before the review, contact the FOD and Web Coordinator to go over the web management QMR criteria again and provide suggestions on how web management could be improved. Offer to assist in conducting staff training.
- Follow up with the FOD and Web Coordinator after the review, offering appropriate assistance in addressing any observations or issues.
- Regional Web Managers may be interviewed during the review process, as defined in the ODOC standards and methodology for reviewing web management (**Appendix J**)

SECTION 3: MANAGEMENT CONTROLS

10: USING WEB ANALYTICAL TOOLS

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

- **Statistical reports** (Webtrends): Statistics for HUD's websites are published monthly, normally by the middle of the month. Statistics can be very useful in
 - Promoting the website with both internal and external audiences (Did you know that HUD's website had more than 1 million unique visitors last month? Did you know that the "homebuying" page was the most used page this month?)
 - Identifying navigation problems – if you think a page should be getting more use than it is, then maybe you need to change the navigation to that page, so it's more prominent
- **404 error reports:** These reports help you spot bad links – links to pages no longer available. See **Appendix L** for instructions on its use.
- **File management reports** – these reports help Web Managers identify files currently on the production server. You can use this report to find files that should be removed or archived.
- **Linkbot reports:** Linkbot reports help identify broken links.
- **American Customer Satisfaction Inventory (ACSI):** The ACSI helps us get feedback from citizens and partners who use our Internet websites, about their perception of the sites. Customer satisfaction scores help us know our audiences' perceptions about our sites. They may or may not actually reflect how well audiences can use our sites.
- **Usability tests:** usability testing helps us know what our audiences actually do on our sites. These tests can help us determine where we've got navigation problems or wording problems.

WEB MANAGEMENT CALENDAR

Each year, we go through many of the same cycles. This calendar will help you plan for upcoming events.

January

- Update kiosk partnerships
- Web Content Manager Forum meeting (3rd Thursday of the month)

February

- Web Manager Meeting
- Web Clinics
- Begin annual Working Capital Fund budget process
- Web Content Manager Forum meeting (3rd Thursday of the month)
- Support Black History Month

March

- Web Clinics
- Web Content Manager Forum meeting (3rd Thursday of the month)
- Support SuperNOFA process
- Contact Public Affairs about Homeownership Month plans

April

- Web Clinics
- Web Content Manager Forum meeting (3rd Thursday of the month)
- Support Fair Housing Month

May

- Web Clinics
- Web Manager Meeting
- Web Content Manager Forum meeting (3rd Thursday of the month)
- Support Memorial Day remembrance

June

- Web Clinics
- Issue "State of the Web"
- Web Content Manager Forum meeting (3rd Thursday of the month)
- Support Homeownership Month

July

- Departmental Web Team plans Web Clinics for the next fiscal year
- Web Clinics
- Web Content Manager Forum meeting (3rd Thursday of the month)

August

- Web Clinics

- Web Content Manager Forum meeting (3rd Thursday of the month)

September

- Web Manager Meeting
- Prepare Management Plan options for managers
- Web Content Manager Forum meeting (3rd Thursday of the month)
- Update QMR criteria

October

- Participate in Management Plan committees
- Submit web management update for the Financial Management 5-year plan (as requested)
- Web Content Manager Forum meeting (3rd Thursday of the month)

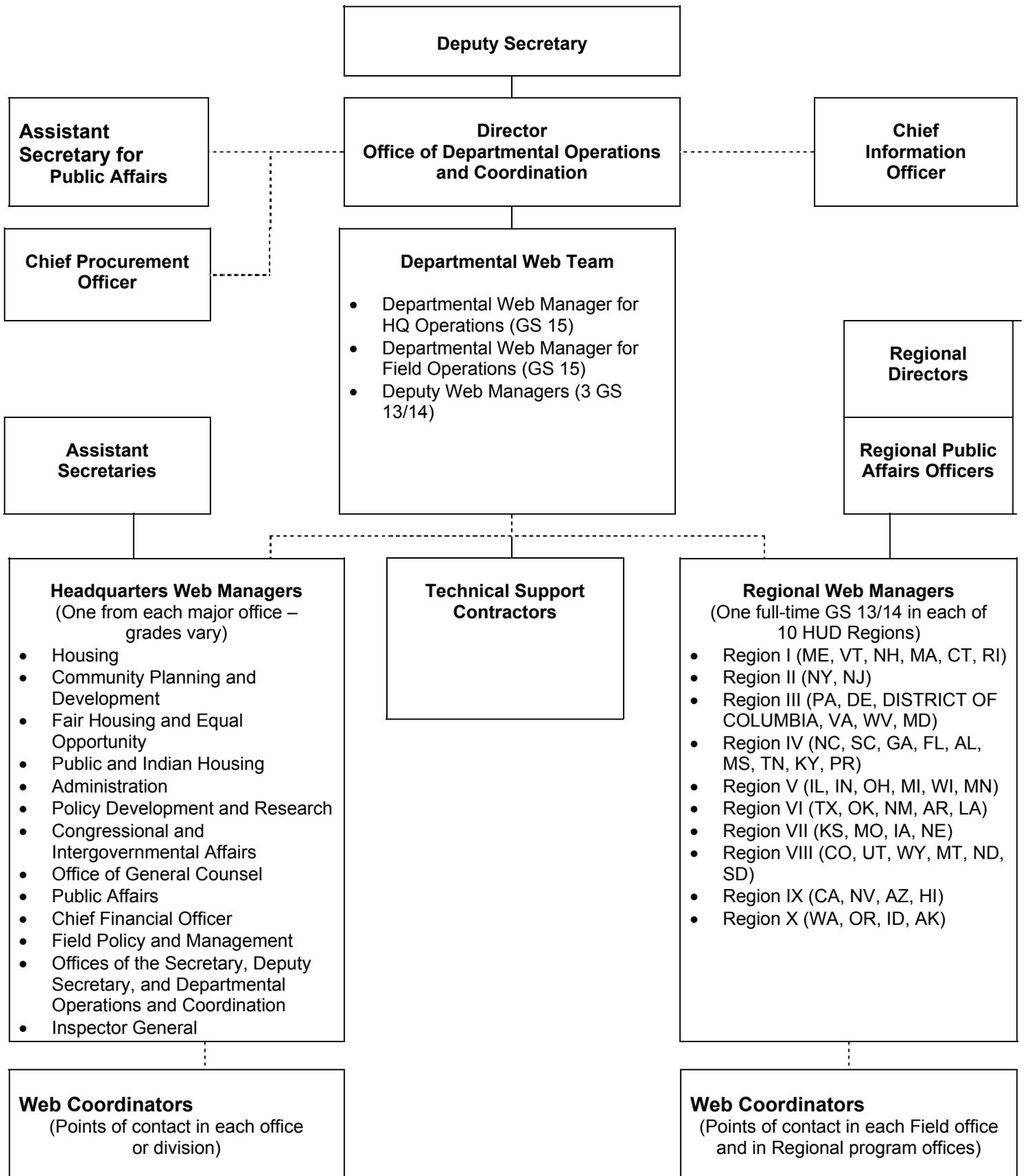
November

- Web Content Manager Forum meeting (3rd Thursday of the month)

December

- Web Content Manager Forum meeting (3rd Thursday of the month)

APPENDIX A: HUD'S Web Management Organization



APPENDIX B : COORDINATING KIOSK MOVES

There are 2 reasons for moving a kiosk

- A kiosk is not meeting the performance standards established by the Department – 250 visitors per month or 3,000 per year, or
- The owner of the current space decides not to retain the kiosks

These are the key HUD players in kiosk relocations:

- Departmental Web Manager for Field Operations (project sponsor): Candi Harrison
- Departmental Web Team Kiosk Project Manager: Joanne Johnson
- Office of Administration Kiosk Project Manager/GTM: James McMahon
- Office of Administration Kiosk Project Field Coordinator: Kathy Brantley
- Regional Web Manager
- Field Office Director (FOD)
- Local Administrative Officer or ARD

Please follow these steps when moving a kiosk.

Step 1: All kiosk moves begin with the Departmental Web Manager for Field Operations.

- If the kiosk must be moved because the lease has expired and the location manager does not want to renew the lease, the Office of Administration Kiosk Project Field Coordinator informs the Departmental Web Manager for Field Operations.
- If the kiosk is not meeting performance standards, the Departmental Web Team Kiosk Project Manager informs the Departmental Web Manager for Field Operations.

Step 2: The Departmental Web Manager for Field Operations notifies the Regional Web Manager that the kiosk must be moved.

Step 3: The Regional Web Manager notifies the appropriate Field Office Director that the kiosk must be moved and offers guidance on finding new locations, based on the Department's location requirements:

- Must be located within 5 miles of low income families
- Must be open evenings and Saturdays
- Must have documented evidence (e.g., customer counts) to provide reasonable assurance that the kiosk will be used at least by 250 visitors per month (3,000 per year)

Step 4: The FOD identifies potential sites and contacts the managers of the site to determine costs/requirements that would be involved. Review of the site should include the number of Hours the facility will be open and the number of people who normally use the facility during an average week. Ideally, we're looking for locations that are open 7 days a week. It must have some evening hours and Saturday hours, or it will not be approved.

Step 5: Once a site is identified, the FOD notifies the Regional Web Manager, providing all supporting documentation.

Step 6: The Regional Web Manager emails the Departmental Web Manager for Field Operations, providing:

- Name and location of the site
- Hours of operation
- Proximity to low-income target audience
- Approximate monthly traffic at the site

Step 7: If the Departmental Web Manager for Field Operations approves the site, she emails the Regional Web Manager, with a copy to the Departmental Web Team Kiosk Project Manager, the Office of Administration Kiosk Project Manager/GTM, and the Office of Administration Kiosk Project Field Coordinator. If the site is not approved, the Departmental Web Manager for Field Operations emails the Regional Web Manager, providing the reasons that the site is not approved.

Step 8: The Regional Web Manager notifies the FOD of the approval or disapproval; **AND** the Office of Administration Kiosk Project Field Coordinator notifies the local office Administrative Officer/ARD.

Step 9: The Administrative Officer/ARD negotiates the lease agreement, working with the Office of Administration Kiosk Project Field Coordinator to ensure that funds are available.

- As a rule, HUD will pay no more than \$300 per month to rent space for a kiosk.
- In rare exceptions, we may approve rentals up to \$600. **Anything over \$300 per month must be approved by the Departmental Web Manager for Field Operations.**
- If the lease amount is greater than \$2,500 annually, the administrative staff will work through GSA to execute the lease. Typically, when GSA is involved, it will take longer to execute the lease agreement; so that needs to be considered in planning.

Step 10: The local Administrative Officer/ARD orders and pays for the phone line for the kiosk and makes arrangements and for installation of power sources, if needed.

Step 11: Once the lease is signed and phone and power lines are ordered and installed, the local Administrative Officer/ARD notifies the Office of Administration Kiosk Project Field Coordinator that the move can be scheduled and specifies a local point of contact.

Step 12: The Office of Administration Kiosk Project Field Coordinator notifies the Office of Administration Project Manager/GTM and the Departmental Web Team Kiosk Project Manager.

Step 13: The Office of Administration Kiosk Project Manager/GTM notifies the contractor to arrange the move.

Step 14: The contractor notifies the Office of Administration Kiosk Project Manager/GTM, the Departmental Web Team Kiosk Project Manager, and the local point of contact, when move arrangements are confirmed.

Step 15: The Departmental Web Team Project Manager emails the Regional Web Manager, with a copy to the Departmental Web Manager for Field Operations, confirming the move arrangements and the final move.

APPENDIX C: MANUALLY PROGRAMMING THE LAN KIOSK LED

Each kiosk has an LED display that can be programmed to announce important local events or news. For most of the kiosks, the LED can be programmed from Headquarters. Some kiosks, however, have to be programmed locally. These are the kiosks that operate through HUD's LAN (local area network).

HELPFUL TIPS:

- Each of the LED displays must be programmed individually. You should allow for approximately 20 minutes per LED.
- The LED remote works on infrared technology. Therefore the LED remote control must be pointed towards the LED (about a 3' range) in order for the LED to receive instructions from the LED remote control. The target spot on the LED is in the far left side of the LED.
- The LED will beep each time it receives the infrared signal.
- You must press the **CAPS** button to enable upper case, and then press the **CAPS** button again to turn off upper case before continuing with your input.
NOTE: A small green light will appear in the lower right corner when the **CAPS** is set to **OFF**.
- There should be 2 remotes stored inside the kiosk. If you are unable to locate a remote control or encounter any problems when programming the LED, please contact Marti Henry (202-708-4302 x154).

PROGRAMMING THE LED

- Power to the LED is turned on and off by the **ON/OFF** switch on the LED remote control.
- You begin editing the LED message by pressing the escape (**ESC**) key on the LED remote control.
- "Edit Run Del Set" will display on the LED.
- Press "**E**" for **Edit**.
- At the next menu Press "**P**" for **Page**.
- Up to 26 separate pages or messages may be stored in the LED by assigning it a letter of the alphabet (this can be any letter from A - Z). The letter "**B**" has been chosen to save this message. Press "**B**" to bring up the page that will be assigned to this LED message.
NOTE: The page assigned to the letter "**A**" should contain the default "Welcome to the HUD KIOSK" message. This message will remain in memory for later use if needed. It can be reinstated at any time by following these instructions and replacing the letter assigned to the page.
- Press and hold the delete (**DEL**) key until you hear double beeps, and/or see **START** on the far right. (This means that the existing content of that page has been deleted and the new content can now be entered.)
- Press **CAPS** once to turn on upper case and press the "**N**". **NOTE:** Some LED's are the opposite and **CAPS** is the default.
NOTE: If a small green light appears in the lower right corner of the LED, the **CAPS** is set to **OFF**.
- Press **CAPS** again to turn off upper case and continue to type the remaining text as shown above, turning on **CAPS** as needed.
NOTE: To type a figure, such as "=", press the "FIG/SYMBOL" button *once*. To type a symbol, such as "?", press the "FIG/SYMBOL" button *twice*. On your LED remote control, the symbols will be in green and the figures will be in white.
- After you finish entering "**Kiosk.**" at the end of the message, press the **Space** button until

June 1, 2005

the words "**New Information**" disappear from the LED screen. This allows the entire message to scroll completely off the LED screen prior beginning the message again.

- Press the **ENTER** button (this saves the page you just entered).
- Press the escape (**ESC**) button for the "Edit **R**un **D**el **S**et" menu.
- "Edit **R**un **D**el **S**et" will display on the LED.
- Press "**R**" for run.
- Press "**P**" for page.
- Press "**B**" for page "**B**" (if this was the page you used above to store this message). The new message is now saved and active and will now scroll across the LED.

TIPS:

- Press the **ESC** button to access the **E**dit **R**un **P**age commands at any time to change the message that is displayed.
- If you are unable to communicate with the LED, make sure that there are two fresh AA batteries in the remote.

APPENDIX D: CHECKLIST FOR WEB CLINIC TRAINING TEAMS

At least 6 weeks in advance

- Make hotel reservations
- Contact the FOD (or RD, in a Regional Office) and the local contact person – copy the Regional Web Manager.

Sample message:

Greetings, Pat and Marvel! Sam and I are looking forward to coming your way to do a Web Clinic on November 13. I just wanted to confirm our needs. Basically, all we need is a room that can seat at least 25 people (preferably classroom style), a screen, an InFocus projector, and an Internet connection. We'll bring everything else.

We hope you'll cast a wide net to invite HUD partners and potential partners throughout your region (you don't need to stop at the borders of your jurisdiction). We encourage you to reach out to public housing agencies, state and local governments, CDBG grantees, non-profits, faith-based and community-based organizations, multifamily housing managers, and others. We need a minimum number of 25 people pre-registered (we always have about a 20% no-show rate) to make our travel cost-effective. You can find more information about hosting the Web Clinics at: <http://hudatwork.hud.gov/webinc/webclinic/checklst.htm>. Your Regional Web Manager would be happy to assist you.

We'll plan to arrive at your office the day before the clinic, to make sure our laptop works OK and check on the setup. (Office Director's name) - we'd love it if you could intro us on the morning of the clinic. We always like to give it that "local connection."

Please let me know if you have any questions. We're looking forward to seeing both of you.

- Candi

- Consult with the Regional Web Manager about plans. If at all possible, the Regional Web Manager should plan to attend. Make sure the Regional Web Manager puts a link to the Web Clinic page on the front of the state page.

Week before the clinic

- Contact the local contact person. Check to make sure there are at least 25 people signed up. If there are fewer – and the prospect of getting 25 is dim – we may need to cancel the clinic. **Only the Departmental Web Managers can decide to cancel clinics.** If it is decided to cancel a Clinic, the trainers assigned to that Clinic should contact the FOD and/or local contact immediately to communicate the decision and explain the situation. Please be sure to arrange to get the packets returned.
- Establish a time and place to meet the local contact person the day before the clinic, to set up the room and test the computer hook up.
- Send the itinerary to ODOC and the Departmental Web Team members. Include: hotel address, travel plans (including flight numbers and times), clinic location, local contact, and cell phone numbers.
- Be sure to take a tax-exempt form with you for the hotel.
- Make sure you have your travel authorization.

Day before the clinic

- Arrive in time to meet the local contact person, make a courtesy visit to the FOD or RD, and check out the training room. ***It is absolutely essential that you test the Internet connection the day before the clinic, to make sure it will work properly.*** Many times, we've had to do quick fixes or find additional cables and cords to ensure the laptop and/or projector works. Don't take chances – test the equipment. Participants hate it when we have technical problems that could have been avoided.
- Position tables so that participants will be comfortable and so that they have a clear view of the screen. Leave yourself room to move among the participants, if possible.
- Test the lighting. You may have to dim the front lights and/or adjust the window blinds to minimize the glare on the screen. Be sure to walk to the back of the room and check to see that the participants can see the screen easily.
- Make sure the local host has created the name tags and has the signs ready to go.

After the clinic

- Be sure to ask the local contact person to return any extra packets and supplies to the Web Team.
- Send a thank-you email to the local contact. Be sure to name any local staff who did something to help you – e.g., IT staff who may have helped with set-up, receptionists who help direct attendees, etc. Copy:
 - the FOD,
 - the RD,
 - your training partner,
 - the Departmental Web Managers
 - the ODOC Directors
 - the Assistant Deputy Secretary for Field Policy and Management, and
 - the Regional Web Manager.

Sample message:

Pat and Marvel -

What a terrific time we had in New Orleans, working with you folks and the folks at Dillard on that web clinic. Marvel - you did an excellent job getting everything organized. The goodies for the attendees were such a nice (and appreciated) touch. Please also thank Eleanor Peyton and Tia Evans for their help with registration and hosting duties.

I'll drop a line to our friends Dean Tom Holton and Theodore Callier, at Dillard. It was such a bonus to be able to hold the clinic in that brand new tech center at one of our HBU grantees and to see that beautiful old university.

Again, many thanks for being wonderful hosts. The evaluations were excellent, and I think we really got some folks excited about what they can do with the web. Hope we'll see you again, one of these days.

- If the clinic was held at a facility other than a HUD office, send thank you's to your hosts/contacts at that facility.
- Send the Departmental Web Team the actual cost of your travel.
- Send the evaluations and sign-in sheets to the Departmental Web Manager

APPENDIX E: CHECKLIST FOR WEB CLINICS HOSTS

Web Clinics for HUD Partners are a great opportunity for the local HUD Office, in partnership with the Department's Web Team, to reach out to HUD's partners, helping them do their work more effectively through the web. The Department's Web Team will do all the presentations and supply the basic handouts. As hosts for the event, your job will be to invite the participants and manage the logistics locally.

Here is a checklist to help you (and help us) make your Web Clinic a success!

Before the Clinics

___ **Reserve meeting space:** Clinics will begin at 8:45 a.m. and end at 3:15 p.m. Registration for the Clinic begins at 8:30 a.m. Ideally, you should find a space that allows you to set up a registration table outside of the room. Clinics can be as large (or as small) as the meeting room available. Normally, we prefer groups of 30 - 50, although some clinics have exceeded that number. If possible, schedule the clinic in a room that allows participants to sit at tables or desks - it makes it easier for them to take notes. Because the participants will be looking at websites displayed on the screen, it's a good idea to find a room that allows them to sit as close as possible (within 15 - 20 feet, if possible). We often get complaints when participants have to sit farther back and have trouble seeing the screen or hearing the speakers. Sometimes, you can solve this problem by setting up the room sideways (instead of longways).

___ **Make sure the room has an Internet connection and a power source** for both a laptop computer. If extension cords will be needed, arrange for them. Cords should be taped to the floor, for safety's sake.

___ **Reserve an InFocus projector** if one isn't available in the meeting room. If an extension cord is needed, be sure to arrange for it as well. Cords should be taped to the floor, for safety's sake.

___ **Arrange for a speakers table and a table for the projector:** A table with 2 chairs should be set up in the front of the room (make sure it doesn't block the audience's view of the screen).

___ **Microphones:** We will not need microphones unless the room is a large auditorium or ballroom. In that case, please provide 2 lavalier or hand-held microphones. We walk around, while we're doing the presentations; so we need to avoid wires, if possible.

___ **Reserve a large screen,** if one isn't available in the meeting room. If the group is large, you may want to set up 2 screens. In that case, please work with the IT staff to make sure you have the proper cords and equipment to "split" the feed to the screens.

___ **Send out invitations at least 3-4 weeks in advance.** You should talk with your Field Office Director about the best way to do this. One effective strategy is to send a letter from the FOD, along with a copy of the agenda. Some offices also have conducted phone-calling campaigns to make sure their customers know about the clinics. Most offices have very comprehensive mailing lists, so work with your FOD to decide which groups to target. In general, we encourage you to invite

- State and local government agencies,
- Nonprofits,
- Community- and faith-based organizations,
- Housing authorities,

June 1, 2005

- Neighborhood Network groups, and
- Other HUD grantees.

Don't just limit your invitations to groups in your area - we've had people come from neighboring states to attend these Web Clinics. You may want to ask the FODs at neighboring HUD offices to invite their customers, too.

___ **Record RSVPs.** The invitation says that people may register by mail, by phone, or by email. Keep track of the responses. ***Experience has shown that you can expect a no-show rate of about 10 - 25%, so it's a good idea to "over-book."***

___ **Confirm registrations:** If the participant has email, send a message confirming his/her registration. A sample email message follows:

Thanks for your interest in HUD's Web Clinics! We look forward to seeing you at the Web Clinic in the San Francisco HUD Office, to be held on February 8. Registration begins at 8:30 a.m., and the Clinic will start promptly at 8:45 a.m.

Here's some important information. You may want to print this out.

Location: the Web Clinic will be held at the HUD Office, which is located in the Federal Building at 1 Fifth Street. The Clinic will be in Room 10.

Parking: There are several parking garages in the area:

- 1234 Fifth St
- 5678 Tenth St.

Security: Please enter the HUD building through the Fifth Street entrance. You will be asked to sign in and show a picture ID. The security guard will have a list of the Clinic participants, so you shouldn't have any trouble!

Cancellation: If you find you can't attend the Web Clinic, please let me know as soon as possible. We have a waiting list of people who would like to come.

If you have any other questions, please don't hesitate to contact me by email or by phone (555-555-5555).

___ **Advise the Web Team on number of participants:** Please keep the Web Team informed on the number of participants you've registered, so we'll know how many packets to send you and how many copies of the Web Clinic Wizard software to bring with us.

___ **Add local materials to the Clinic packets:** About 2 weeks prior to the Clinic, you will receive a box from the Web Team. It will contain:

- Packets for each Clinic participant
- Blank name tags
- Blank sign-in sheets
- Directional signs, to be posted in your halls on the day of the Clinic

___ **Print name tags for each attendee.** Note: you must use an inkjet printer to print the name tags. A laser printer will cause the pre-printed tags to smear. If you don't have an inkjet printer, then you either can hand-print the name tags or print the names and organizations on plain white stickers and then apply the stickers to the pre-printed name tags.

June 1, 2005

___ **Print a list of places to eat** in the area, for those who want to go out to lunch.

___ **Notify building security:** If the building has a security desk or requires passes to enter, be sure to alert the building manager about the event. On the day of the clinic, you may want to station a staff member at the entrance to ensure that attendees are admitted without problems

Day Before the Clinic

___ **Be available to meet the Web Team around 3 p.m.** At that time, the Web Team will want to see the room in which the training will be held, test the computer (which we'll bring) and the InFocus projector, make sure the room is set up properly, and go over final details with you.

Day of the Clinic

___ **Place signs** at appropriate points in the building, directing attendees to the meeting room. It's a good idea to have these signs up by 8 a.m. – participants often arrive early!

___ **Set up a clinic registration table**, outside the meeting room. Assign staff to meet and greet the attendees and hand out the name tags and packets.

___ **During the Clinic, assist the Training Team** by responding to local questions and providing information on logistics, places to eat, etc. Be sure to note any comments or follow up commitments made during the clinic, so you can relay them to the local HUD staff.

___ **Make copies of the sign-in sheet for your office.** The Web Team will keep the originals.

After the Clinic

___ **Follow up on any promises made at the Clinic**

___ **Provide any feedback about the Clinic to the Departmental Web Team**

APPENDIX F: QUICK GUIDE TO HUD'S HOMES AND COMMUNITIES WEBSITE

Point HUD's customers to these shortcut URLs to information and services they can use.

HUD Strategic Goal 1: Increase homeownership opportunities

- [Homeownership](http://www.hud.gov/homeownership): www.hud.gov/homeownership
- [Homebuyers Kit](http://www.hud.gov/buying): www.hud.gov/buying
- [Local Homebuying Programs](http://www.hud.gov/localbuying): www.hud.gov/localbuying
- [Housing Counseling Agencies](http://www.hud.gov/counseling): www.hud.gov/counseling
- [Predatory Lending](http://www.hud.gov/predatorylending): www.hud.gov/predatorylending
- [Settlement Procedures](http://www.hud.gov/settlement): www.hud.gov/settlement
- [HUD Homes](http://www.hud.gov/hudhomes): www.hud.gov/hudhomes

HUD Strategic Goal 2: Promote decent affordable housing

- [Renters Kit](http://www.hud.gov/renting): www.hud.gov/renting
- [Local Information on Renting](http://www.hud.gov/rentinglocal): www.hud.gov/rentinglocal
- [Housing Counseling Agencies](http://www.hud.gov/counseling): www.hud.gov/counseling
- [Fair Housing](http://www.hud.gov/fairhousinglaws): www.hud.gov/fairhousinglaws
- [Information for Tenants](http://www.hud.gov/tenants): www.hud.gov/tenants
- [Housing Choice Vouchers](http://www.hud.gov/vouchers): www.hud.gov/vouchers
- [Fair Market Rents](http://www.hud.gov/fmrs): www.hud.gov/fmrs
- [Income Limits](http://www.hud.gov/incomelimits): www.hud.gov/incomelimits

HUD Strategic Goal 3: Strengthen communities

- [About Communities](http://www.hud.gov/community): www.hud.gov/community
- [Volunteering](http://www.hud.gov/volunteering): www.hud.gov/volunteering
- [Economic Development](http://www.hud.gov/economicdevelopment): www.hud.gov/economicdevelopment
- [Homeless Initiative](http://www.hud.gov/homelessinitiative): www.hud.gov/homelessinitiative
- [Information On Homeless](http://www.hud.gov/homeless): www.hud.gov/homeless
- [Local Information On Homeless](http://www.hud.gov/localhomeless): www.hud.gov/localhomeless

HUD Strategic Goal 4: Ensure equal opportunity in housing

- [Fair Housing Laws](http://www.hud.gov/fairhousinglaws): www.hud.gov/fairhousinglaws
- [Fair Housing Complaints](http://www.hud.gov/fhcomplaints): www.hud.gov/fhcomplaints
- [Fair Lending](http://www.hud.gov/fairlending): www.hud.gov/fairlending
- [Fair Housing](http://www.hud.gov/fairhousing): www.hud.gov/fairhousing

HUD Strategic Goal 5: Embrace high standards of ethics, management, and accountability

- [About HUD](http://www.hud.gov/abouthud): www.hud.gov/abouthud
- [HUD's Inspector General](http://www.hud.gov/oig): www.hud.gov/oig

HUD Strategic Goal 6: Promote participation of faith-based and community organizations

- [HUD's Center for Faith-Based and Community Initiatives](http://www.hud.gov/faithandCommunity): www.hud.gov/faithandCommunity
- [HUD's Grants](http://www.hud.gov/grants): www.hud.gov/grants
- [HUD's Programs](http://www.hud.gov/programs): www.hud.gov/programs

General Information

- [HUD News](http://www.hud.gov/news): www.hud.gov/news
- [HUD's Priorities](http://www.hud.gov/priorities): www.hud.gov/priorities

June 1, 2005

- [About HUD](http://www.hud.gov/abouthud): www.hud.gov/abouthud
- [Small Business](http://www.hud.gov/smallbusiness): www.hud.gov/smallbusiness
- [HUD Website In Spanish](http://espanol.hud.gov): espanol.hud.gov
- [HUD's Phone Book](http://www.hud.gov/phonebook): www.hud.gov/phonebook
- [HUD's Handbooks and Forms](http://www.hud.gov/handbooks): www.hud.gov/handbooks
- [Local HUD Information](http://www.hud.gov/local): www.hud.gov/local

APPENDIX G: HOW TO CONDUCT A FOCUS GROUP

Why

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

When and Where

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

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

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

Find Your Participants

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

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

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

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

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

Employees –

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

Conduct the Session

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

June 1, 2005

- Be sensitive to the timing of the group. Normally, you'll know when they're winding down. Pace yourself so you're sure to cover what you want to cover before they get tired. When they do get tired, thank them, end the group, and invite them to send any additional thoughts or ideas to you via email (give them your card) or on the phone.
- Be sure to take notes. Don't count on your memory to document what group members tell you. If you find it hard to both lead the group and take notes, take someone with you to do the note-taking.
- Be sure to thank them! They have just given you the gift of their time and energy, so be sure to extend your appreciation.

After the Focus Group

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

APPENDIX H: CONDUCTING STAFF TRAINING

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

Introduction and Overview

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

HUD’s Internet Website: www.hud.gov

- Give them a brief tour of the website
 - Refer to “How to Use This Website:”
<http://www.hud.gov/library/bookshelf15/howtouse.cfm>
- Show them how to navigate by topics, by audiences, by state
 - Explain that our audiences can get to the same information by topic or audience – it just depends on how they think about the information
 - Show them a state page and explain that the state pages are consistent across the country, so that all citizens and partners get the same high-quality information no matter where they live
 - State pages provide the bridge from generic national information to local information on our partners websites
 - State pages provide “inherently local” information to supplement the generic or national information on Headquarters pages
- Show them the site index and search page - <http://www.hud.gov/assist/siteindex.cfm>
- Point out our “killer content” – “Let HUD Help You” – those are the most important services we provide through the website...some of the major ways we use the web to achieve HUD’s mission
 - Show them how you can search for a subsidized apartment
 - Show them how you can put in your name and find out if you are owed an FHA refund
- Show them the “quick links” – those are links to the most requested information on the website

June 1, 2005

- Show them the “highlights” section – that’s where news releases and current “message” information is located
- Point out the About HUD page
 - Mission
 - Organization
 - Principal Staff
 - Links to all offices
 - Phone book
- Point out “Contact Us”
 - Show them the email policy
- Point out “Common Questions”
- Tell them about mailing lists - <http://www.hud.gov/subscribe/index.cfm>
- Tell them about the shortcuts or “aliases” – the short URLs that they can give out to customers to get them to the most-used information on the website <http://hudatwork.hud.gov/po/odoc/webinc/aliases.cfm>
- Tell them about webcasts - <http://www.hud.gov/webcasts/index.cfm>
- Show them the page(s) for their office (either HQ office page or state page)
- Take questions

hud@work

- Explain that we spent more than a year redesigning hud@work (in 2004-2005) to make it do what employees told us they wanted: less content, simpler content
- Show them the basic navigation
 - Drop-down menus
 - The topic box for their own office or region
 - A-Z directory
 - Show them how the topic box changes when they go to another content area, but they always can get back to their own topic box by clicking “home” or by clicking their office name in the drop-down menu
 - Point out the photos of HUD staff in the masthead – invite them to submit photos from their own offices
- Show them how to customize
- Show them how to use the locator to find people in an organization
- Take questions

Archives.hud.gov

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

Tips and Tricks

- Show them how to set their printer margins so they can print the entire page
- Show them how to get the text version, to make printing easier
- Show them the “photo gallery” on one of the state pages, and tell them how they can submit photos of their own, showcasing good things that are going on as a result of HUD’s programs
- Ask them to share any tips and tricks that they’ve learned to use, on HUD’s websites
- Take questions

Thank them for coming, and ask them to spread the word about HUD’s websites.

APPENDIX I: USING THE WEB TO IMPLEMENT HUD'S STRATEGIC GOALS

HUD's Web Managers have generated a number of ideas that managers may want to consider as you develop your Plans.

Strategic Goal 1: Increase homeownership opportunities

Opportunities:

1. Promote/market information already on HUD's website by educating staff about its availability and publicizing it to HUD partners and the public through speeches, presentations, advertising, and other outreach efforts. Examples of specific information already available that supports this goal include:
 - Homebuyers kit
 - English (<http://www.hud.gov/buying/index.cfm>)
 - Spanish (<http://espanol.hud.gov/buying/index.cfm>)
 - Common Questions from First-time Homebuyers
 - English (<http://www.hud.gov/buying/comq.cfm>)
 - Spanish (<http://espanol.hud.gov/buying/comq.cfm?&lang=es>)
 - Housing counseling
 - English (<http://www.hud.gov/offices/hsg/sfh/hcc/hccprof14.cfm>)
 - Spanish (<http://espanol.hud.gov/offices/hsg/sfh/hcc/hccprof14.cfm?&lang=es>)
 - Local homebuying programs – including programs to help with down payments
 - English (<http://www.hud.gov/buying/localbuying.cfm>)
 - Spanish (<http://espanol.hud.gov/buying/localbuying.cfm?&lang=es>)
 - Homeownership vouchers
 - English (<http://www.hud.gov/offices/pih/programs/hcv/homeownership/>)
 - Spanish (<http://espanol.hud.gov/offices/pih/programs/hcv/homeownership/index.cfm?&lang=es>)
 - Borrower's rights
 - English (<http://www.hud.gov/offices/hsg/sfh/res/resborwr.cfm>)
 - Spanish (<http://espanol.hud.gov/offices/hsg/sfh/res/resborwr.cfm?&lang=es>)
 - Fair housing
 - English (<http://www.hud.gov/offices/ftheo/FHLaws/FairHousingJan2002.pdf>)
 - Spanish (<http://espanol.hud.gov/offices/ftheo/FHLaws/index.cfm>)
2. Incorporate "good stories" about homebuying experiences, including ways that local people purchased their first home using FHA loans or other local-homebuying programs funded through Block Grants.
3. Work with housing counseling agencies to identify local homebuying issues/problems, and then post commensurate information on the website.
4. Showcase espanol.hud.gov whenever promoting minority homeownership, and inform partners (lenders, brokers, etc.) about the information available from HUD's Spanish website
5. Post sample forms used at settlement so prospective homebuyers know what to expect (including examples of state-mandated forms).
6. Advertise/publicize homebuyer education classes.
7. Webcast a local homebuyer education class or a Q&A session with HUD staff on homebuying
8. Add explanations/tips on financial literacy, including, including local credit education programs and local down payment assistance programs.
9. Seek and publish "good stories" about people who have moved from rental housing to homeownership.
10. Use realtime chat capabilities to answer potential homebuyer questions.

11. Create a homeownership discussion room, where potential homebuyers can exchange knowledge and interact with knowledgeable HUD staff
12. Use the kiosk LED feature to promote housing opportunities

Strategic Goal 2: Promote decent affordable housing

Opportunities:

1. Promote/market information already on HUD's website by educating staff about its availability and publicizing it to HUD partners and the public through speeches, presentations, advertising, and other outreach efforts. Examples of specific information already available that supports this goal include:
 - Renters' Kit
 - English (<http://www.hud.gov/renting/index.cfm>)
 - Spanish (<http://espanol.hud.gov/renting/index.cfm>)
 - Housing counseling
 - English (<http://www.hud.gov/offices/hsg/sfh/hcc/hccprof14.cfm>)
 - Spanish (<http://espanol.hud.gov/offices/hsg/sfh/hcc/hccprof14.cfm?&lang=es>)
 - Tenant information
 - English (<http://www.hud.gov/groups/tenants.cfm>)
 - Spanish (<http://espanol.hud.gov/groups/tenants.cfm?&lang=es>)
 - Homeownership vouchers
 - English (<http://www.hud.gov/offices/pih/programs/hcv/homeownership/>)
 - Spanish (<http://espanol.hud.gov/offices/pih/programs/hcv/homeownership/index.cfm?&lang=es>)
 - Information for PHAs and Tribes
 - English (<http://www.hud.gov/groups/phastribes.cfm>)
 - Spanish (<http://espanol.hud.gov/groups/phastribes.cfm?&lang=es>)
 - Information for landlords
 - English (<http://www.hud.gov/groups/landlords.cfm>)
 - Spanish (<http://espanol.hud.gov/groups/landlords.cfm?&lang=es>)
 - Fair housing
 - English (<http://www.hud.gov/offices/ftheo/FHLaws/FairHousingJan2002.pdf>)
 - Spanish (<http://espanol.hud.gov/offices/ftheo/FHLaws/index.cfm>)
2. Promote the advantages of renting properties to voucher holders, particularly in cities/states lacking affordable housing.
3. Create a section on "developing affordable housing," to include federal, state, and local funding programs.
4. Showcase espanol.hud.gov whenever promoting HUD's rental assistance programs, and inform HUD partners – such as PHAs – about the information available from HUD's Spanish website
5. Encourage PHA Directors/leaders to attend HUD Web Clinics and Web Conferences so they can create good websites that both inform current and potential residents and provide services online.
6. Mail out the list of suggestions for PHA websites that has been developed by the Departmental Web Team.
7. Enhance/improve information for tenants of public and assisted housing to include such information as how to develop good credit, how to maintain their apartments, and how to resolve problems with their project managers, citing local resources where possible.
8. Enhance/improve information for property managers, to include good stories about successful public and assisted housing properties and tips for making their properties more tenant-friendly.

9. Seek opportunities to meet with/speak to PHA directors to encourage them to use the web to serve their customers (e.g., do presentations at state meetings).
10. Do a webcast on local rental programs and opportunities
11. Create a discussion room so people seeking affordable housing can exchange tips and interact with knowledgeable HUD staff
12. Use realtime chat technology to respond to questions from people looking for affordable housing
13. Use the kiosk LED feature to promote affordable housing opportunities

Strategic Goal 3: Strengthen communities

Opportunities:

1. Promote/market information already on HUD's website by educating staff about its availability and publicizing it to HUD partners and the public through speeches, presentations, advertising, and other outreach efforts. Examples of specific information already available that supports this goal include:
 - Volunteering
 - English ([http:// www.hud.gov/volunteering](http://www.hud.gov/volunteering))
 - Spanish (<http://espanol.hud.gov/volunteering/index.cfm?&lang=es>)
 - About communities
 - English (<http://www.hud.gov/community/index.cfm>)
 - Spanish (<http://espanol.hud.gov/community/index.cfm?&lang=es>)
 - Organizing your community
 - English (<http://www.hud.gov/organizing/index.cfm>)
 - Spanish (<http://espanol.hud.gov/organizing/index.cfm?&lang=es>)
 - HUD's Homeless Initiative
 - English (<http://www.hud.gov/homelessinitiative>)
 - Spanish (<http://espanol.hud.gov/initiatives/homeless.cfm?&lang=es>)
 - Local information for homeless (use the state page links in English and Spanish)
2. Increase information about local resources for community development and revitalization.
3. Seek out and publish "good stories" about community groups and others who do creative things to revitalize their communities and, specifically, on efforts that result in creation of new jobs.
4. Showcase espanol.hud.gov whenever promoting HUD's community development programs, and inform partners (state and local governments, nonprofits, etc.) about the information available from HUD's Spanish website
5. Improve/enhance information on the website (the "your community" sections) educating citizens about the importance of community involvement and informing them of ways to help in revitalization efforts.
6. Create information about and for neighborhood organizations.
7. Expand/highlight local resources for the homeless and potentially homeless.
8. Reach out to Continuum of Care coordinators in the states, and work with them to develop good websites.
9. Set up a discussion rooms for partner groups, such as Continuum of Care and Block grant recipients, so they can interact among themselves and with HUD staff.
10. Create a webcast showcasing outstanding local efforts to develop communities and informing the audience on ways to get involved
11. Use realtime chat technology and/or discussion rooms to answer questions from community groups and others about ways to work with HUD to enhance communities
12. Establish mailing lists so partner organizations can subscribe to routine updates about HUD programs and initiatives

Strategic Goal 4: Ensure equal opportunity in housing.

Opportunities:

1. Promote/market information already on HUD's website by educating staff about its availability and publicizing it to HUD partners and the public. Examples of specific information already available that supports this goal include:
 - Fair housing
 - English (<http://www.hud.gov/offices/fheo/FHLaws/FairHousingJan2002.pdf>)
 - Spanish (<http://espanol.hud.gov/offices/fheo/FHLaws/index.cfm>)
 - Housing discrimination complaints
 - English (<http://www.hud.gov/complaints/housediscrim.cfm>)
 - Spanish (<http://espanol.hud.gov/complaints/housediscrim.cfm?&lang=es>)
 - Information for senior citizens
 - English (<http://www.hud.gov/groups/seniors.cfm>)
 - Spanish (<http://espanol.hud.gov/groups/seniors.cfm?&lang=es>)
 - Information for people with disabilities
 - English (<http://www.hud.gov/groups/disabilities.cfm>)
 - Spanish (<http://espanol.hud.gov/groups/disabilities.cfm?&lang=es>)
 - Local information on predatory lending
 - English (<http://www.hud.gov/local/il/homeownership/predatorylending.cfm>)
2. Enhance/improve local information for people with disabilities and senior citizens.
3. Seek and publish "good stories" about successes in overcoming housing discrimination.
4. Present local webcasts on options/opportunities for people with disabilities and senior citizens.
5. Use realtime chat technology to respond to questions about fair housing
6. Showcase espanol.hud.gov whenever promoting fair housing information, and inform partners (FHIPs, FHAPs, etc.) about information available from HUD's Spanish website

Strategic Goal 5: Embrace high standards of ethics, management, and accountability.

Opportunities:

1. Promote/market information already on HUD's website by educating staff about its availability and publicizing it to HUD partners and the public through speeches, presentations, advertising, and other outreach efforts. Examples of specific information already available that supports this goal include:
 - Employee information and training on ethics (<http://hudatwork.hud.gov/po/c/ethics.cfm>)
 - Employee information on management controls (<http://hudatwork.hud.gov/po/f/risk/mancontrol.cfm>)
 - Information on audits and investigations (<http://hudatwork.hud.gov/po/g/>)
 - Options for filing complaints with HUD
 - English (<http://www.hud.gov/complaints/index.cfm>)
 - Spanish (<http://espanol.hud.gov/complaints/index.cfm?&lang=es>)
 - Options for contacting HUD for further information or assistance
 - English (<http://www.hud.gov/assist/contactus.cfm>)
 - Spanish (<http://espanol.hud.gov/assist/contactus.cfm?&lang=es>)
2. Ensure that "front desk" staff are aware of what's on the website, so they can provide better customer service.
3. Work with managers and staff throughout the organization to keep web content current and accurate, in compliance with Departmental policies.
4. Talk with local Ethics Officers and IG staff about ways to publicize the importance of good ethics (possibly including specific examples or case studies).
5. Promote ethics training on the web.

Strategic Goal 6: Promote participation of faith-based and community organizations

Opportunities:

1. Promote/market information already on HUD's website by educating staff about its availability and publicizing it to HUD partners and the public through speeches, presentations, advertising, and other outreach efforts. Examples of specific information already available that supports this goal include:
 - HUD's Center for Faith-based and Community Initiatives
 - English (<http://www.hud.gov/offices/fbci/index.cfm>)
 - Spanish (<http://espanol.hud.gov/offices/fbci/index.cfm?&lang=es>)
2. Increase the resources available on the regional Faith-based and Community Toolkits (e.g., <http://www.hud.gov/local/shared/working/faithbased/ixfaithbased.cfm?state=az>)
3. Seek out and publish "good stories" resulting from the work of faith-based and community-based organizations.
4. Webcast local faith-based conferences, so those who can't attend can see what transpired
5. Create mailing lists for faith-based organizations to get additional information about HUD's programs and efforts
6. Create discussion rooms for faith-based partners so they can interact with one another and knowledgeable HUD staff
7. Make a special effort to invite faith-based and community-based groups to HUD Web Clinics and Web Conferences.
8. Showcase espanol.hud.gov at faith-based conferences and whenever promoting HUD's faith-based and community partnerships, and inform partners about the information available from HUD's Spanish website

APPENDIX J: QUALITY MANAGEMENT REVIEW (QMR) STANDARDS

ASSESSMENT AREA: WEB CONTENT MANAGEMENT

Function: Develop, coordinate, maintain, and manage content for HUD's Internet and intranet websites and kiosks, in accordance with Departmental web policies, publication procedures, web management operating procedures, and other guidance from the Departmental Web Team

Standards for Acceptable Performance

- Managers and staff in the Office are aware of the Department's web policies and publication standards and use them to develop and maintain web content
- Regional Director (RD) or Field Office Director (FOD) has assigned web coordination duties to a staff member who has the credibility and capabilities to complete the duties successfully.
- If the review covers an office where the Regional Web Manager is located, the Regional Web Manager has adequate support to coordinate the web duties for that office, as well as performing his/her regional duties.
- Web Coordinator understands the duties for which he/she is responsible and has adequate time, cooperation, training and support to complete the duties successfully.
- Quarterly certifications are submitted in a timely manner
- FOD or RD/designee is familiar with the web content developed and maintained by the Office (websites and the kiosks) and takes action to ensure its quality
- Program managers are familiar with the web content developed and maintained by their organizations and take action to ensure its quality

Measurement Criteria

- FOD/RD (or designate) has taken action to ensure that managers and staff throughout the Office are aware of the Department's web policies and publication standards.
- Web Coordinator is designated, and staff within the office knows whom their Web Coordinator is.
- FOD (or Regional Director or designee) takes specific steps to ensure that the Web Coordinator has ample access to and cooperation from managers and staff to develop, update, and submit web content (e.g., invites Web Coordinator to staff meetings to report on progress/initiatives, sends email or memos to managers/staff supporting the efforts of the Web Coordinator, etc.)
- Web Coordinator reports he/she is familiar with the Department's web policies and publication standards and uses them when developing and maintaining web content
- Web Coordinator is meeting deadlines, providing adequate and timely web content.
- Web Coordinator reports adequate understanding of duties and adequate time to complete duties.
- Web Coordinator has sought guidance or clarification when duties were unclear.
- FOD or RD/designee reports that he/she routinely monitors the content of HUD's websites for which his/her office is responsible
- Regional Web Manager reports no major issues related to the quality or timeliness of certifications received from the Office
- Program managers report that they are aware of the Department's web policies and publication standards and ensure that their staff use them when developing and maintaining web content
- Program managers report that they have designated staff in their organizations to work with the Web Coordinator in developing and maintaining content

Review Methodology

- Prior to the onsite review, briefly review (spot check) the hud.gov state pages, the [hud@work](#) pages, and the kiosk content for the office to see if content appears to be current, accurate, complete, and clear.
- Prior to the onsite review, conduct telephone interview with the Regional Web Manager for the region involved.
- Prior to the review, contact the Departmental Web Team to get a copy of the most recent quarterly certification
- During the review, interview
 - The FOD (or the RD or designee),
 - The Web Coordinator for the office, and
 - At least three key program managers.

Interview Questions

Questions for the Regional Web Manager:

- Are the FOD (or RD/designate) and Web Coordinator familiar with the Department's web policies and publication standards, as evidenced by the web content they generate?
- Are quarterly certifications submitted on time?
- Is content that is requested submitted in a timely manner and with ample clarity, organization, quantity, and quality?
- Does the Web Coordinator contact you in a timely manner when there are issues or problems?
- Is the Web Coordinator responsive when you point out deficiencies or omissions in content submitted?
- In your view, is the Web Coordinator performing all the duties assigned in an adequate manner? If not, what do you think is the cause?
- Has the Web Coordinator received guidance and training from you, in order to perform his/her duties?
- Are there any issues related to web management in this office that you believe should be reviewed?

Questions for the FOD (or – in Regional Offices – RD/designee):

- Are you aware of the Department's web policies and publication standards? What actions have you taken to ensure that the managers and staff in your Office are aware of these policies and procedures?
- Does the staff in your office know who their Web Coordinator is and are they aware of his/her functions?
- Do you meet with your Web Coordinator regularly to ensure that web duties are being covered in a satisfactory manner?
- Are you familiar with the web content provided by your office?
- Do you spot check your website pages and kiosk content to ensure that information is current and accurate, before you certify each quarter?
- Does your Regional Web Manager keep you informed on the Department's web policies and initiatives?
- Do you have any suggestions for ways to improve web management at HUD?

Questions for the designated Web Coordinator for the office:

- Are you familiar with the Department's web policies and publication standards?
- Do you understand your responsibilities? If not, what specific parts of your responsibilities do you not understand?

- Do you have adequate time to perform your responsibilities? If not, have you discussed this with your supervisor and/or the FOD (or RD/designate)?
- Are there specific responsibilities for which you believe you need more training? What are they?
- Do you have adequate access to the FOD (or RD/designate) to get guidance when you need it?
- Do managers and staff in your office understand your role
- Is your Regional Web Manager available to you to provide guidance and training for your web-related duties?
- Do you have any suggestions for ways to improve web management at HUD?

Questions for key program managers in the office:

- Are you aware of the Department's web policies and publication standards?
- Do you have someone on your staff designated to develop and submit web content?
- Do you meet with your web contact regularly to ensure that your office is providing comprehensive, quality information?
- Are you familiar with the content provided by your office?
- Do you spot-check content for which your organization is responsible to ensure that information is current and accurate?
- Do you have any suggestions for ways to improve web management at HUD?

ASSESSMENT AREA: WEB TRAINING

Function: Train staff to use the web, in general, and HUD's websites, in particular

Standards for Acceptable Performance

- Field Office Director (or Regional Director or designee) and key program managers encourage and create opportunities for HUD staff to learn how to use the web, in general, and HUD's websites, specifically, as tools to do their jobs.
- Staff who respond to questions from HUD customers as one of their primary duties (specifically those who answer phones or handle walk-in traffic) know how to use HUD's websites to find answers

Measurement Criteria

- HUD employees report that they know how to use the web and HUD's websites in performance of their jobs or that they have been given opportunities to learn how to use the web and HUD's websites
- Web Coordinator and/or Regional Web Manager can site specific actions to train employees on using the web.
- FOD (or RD/designate) and Web Coordinator have ensured that staff who perform customer service functions, in particular, are able to use the websites to find answers to customer questions

Review Methodology

- Prior to the onsite review, conduct telephone interview with the Regional Web Manager for the region involved.
- During the review, interview
 - The FOD (or the RD/designee),
 - At least three key program managers, and
 - At least three HUD staff (at random).
 - At least one staff member who answers questions from HUD customers

Interview Questions

Questions for the Regional Web Manager:

- Have you conducted training sessions for HUD staff in this Office personally or have you worked with the FOD/Web Coordinator to arrange for training?
- Have you received any requests for web training or are you aware of any deficiencies in the skills of employees in the office in using the web?

Question for the FOD (or Regional Director or designee):

- Does the staff in your office know how to use the web in their work, in general, and how to use HUD's websites, specifically?
- Have you asked the Web Coordinator or the Regional Web Manager to conduct training for staff in the office?

Questions for key program managers in the office:

- Does the staff in your office know how to use the web in their work, in general, and how to use HUD's websites, specifically?
- Have you asked the Web Coordinator or the Regional Web Manager to conduct training for staff in the office?

Questions for HUD employees in the office:

- Do you know how to use the web, in general, and HUD's websites, in particular, to do your work?
- Have you received training to use the web or, if not, are you aware that training has been offered?
- Do you use hud.gov in your work? What specific parts of the website do you use?
- Do you use hud@work in your work? What specific parts of the website do you use?
- Do you have any suggestions for ways to improve HUD's websites or web management at HUD?

Questions for staff who answer questions from HUD customers

- Do you know how to use HUD's websites to respond to questions from HUD's customers? If not, have you been offered or sought training?

ASSESSMENT AREA: PROMOTING HUD'S WEB PRODUCTS

Function: Promote HUD's web products (www.hud.gov, espanol.hud.gov, archives.hud.gov, and hud@work), kiosks, HUD Public Computers, and Web Clinics) with their intended audiences.

Standard for Acceptable Performance

- FOD (or RD/designee) and program managers promote HUD's websites, kiosks, and Web Clinics in meetings and interactions with industry, partners, and the public; and they encourage their staffs to do the same.
- FOD (or RD/designee) and program managers encourage HUD staff to use hud@work in their jobs
- Staff who respond to customer questions (primarily those who answer the phones or handle walk-in traffic) refer customers to HUD's websites (including espanol.hud.gov), kiosks, and HUD Public Computers
- Web Clinics held in the Office are promoted extensively, and the FOD (RD/designee) acts as host

Measurement Criteria

- HUD partners report they are aware of HUD's websites and what they have to offer them.
- HUD managers and staff report that they promote HUD's websites, kiosks, and Web Clinics in their meetings and presentations.
- If a Clinic has been held in the Office, HUD partners report that they were invited
- If a Clinic has been held in the Office, the FOD (RD/designee) acts as host for the Clinic by making introductions or offering a greeting at some point during the day
- HUD staff who respond to customer questions report that they refer customers to HUD's website, kiosks, and HPCs
- HUD Public Computers are clearly available to walk-in traffic, and signage exists to direct walk-in traffic to the HPCs
- FOD (or RD/designate) and Web Coordinator routinely monitor the kiosk and HPC statistics and take action to promote these web products, if statistics indicate low use
- HUD staff report they know about hud@work and are encouraged to use it in their jobs

Review Methodology

- Prior to the onsite review, peruse the kiosk and HPC statistics for the Office (note: performance measures for kiosks are defined on the statistics page; at this date, no performance measures have been established for HPCs)
- Prior to the onsite review, contact the Departmental Web Managers to determine whether a Web Clinic has been held in the Office
- Prior to the onsite review, conduct telephone interviews with at least three HUD partner organizations of various types (e.g., PHA, local government, nonprofits, lenders, etc.).
- During the review, visit the HPC to ensure that it is functioning and that it is visible. Signage should direct walk-in traffic to the HPC
- Prior to the onsite review, interview the Regional Web Manager
- During the review, interview
 - The Web Coordinator
 - The FOD (RD/designee)
 - At least three program managers, and
 - At least 3 HUD staff (at random)
 - At least 1 staff member who answers customer questions

Interview Questions

Question for the FOD (or Regional Director or designee):

- Do you and the staff in your office promote HUD's websites, kiosks, and Web Clinics at industry meetings and other outside events?
- If a Web Clinic was held in your Office, did you actively promote it and host it?
- Do you encourage HUD staff in your office to use hud@work in their jobs?
- Do you promote the use of the HUD Public Computer?

Questions for the Web Coordinator

- Do you take action to promote HUD's web products with HUD staff and HUD's customers?
- Do you encourage HUD managers and staff to promote HUD's web products in their interactions with customers?
- If your Office held a Web Clinic, did you promote it widely?
- Do you monitor the use of the HUD Public Computer and ensure that it is promoted?

Questions for the Regional Web Manager

- Does the Office (managers and staff) promote HUD's web products with HUD customers?
- If the Office held a Web Clinic, did you work with the FOD (or RD/designee) to promote the Clinic?

June 1, 2005

- Do you monitor the kiosk and HPC statistics for the Office and work with the FOD and Web Coordinator to promote them?

Questions for program managers in the office:

- Do you and your staff promote HUD's websites, kiosks, and Web Clinics at industry meetings and outside events?
- Do you encourage your staff to use hud@work in their jobs?

Questions for HUD staff (at random)

- Do you promote HUD's websites, kiosks, and Web Clinics in your interactions with HUD customers?
- Are you encouraged to use hud@work in your job?

Questions for HUD partners:

- Are familiar with HUD's websites (www.hud.gov, espanol.hud.gov, archives.hud.gov)? If so, what parts of the websites do you use?
- Do you find HUD's websites helpful to you in doing your work? If so, how? If not, why not?
- Do you refer your customers (e.g., tenants, applicants, citizens seeking service, etc.) to HUD's websites? If so, for what? If not, why not?
- Do you have any suggestions for ways to improve HUD's websites so that they would be more helpful to you in your work?
- Do you have any suggestions for ways to improve HUD's websites so that they would be more helpful to citizens?
- If a Web Clinic was held in the local Office, were you invited?

Questions for HUD staff who respond to customer questions

- Do you promote HUD's websites and kiosks with customers who call or walk in with questions?

ASSESSMENT AREA: MANAGING WEB-GENERATED EMAIL

Function: Manage web-generated email in compliance with Department web policies

Standard for Acceptable Performance

- FOD (or RD/designee) ensures that email generated by HUD's website is answered promptly and courteously to ensure quality customer service.

Measurement Criteria

- FOD (or RD/designee) takes specific steps to ensure that the Web Coordinator has ample cooperation from managers and staff to respond to web-generated email (e.g., reminds managers/staff of the importance of email responses in staff meetings and memos, ensures that staff are held accountable for timely and courteous responses, etc.)
- FOD (or RD/designee) ensures that managers and staff are familiar with Department web policies on web-generated email
- Web Coordinator is responding to (or ensuring that others respond to) web-generated email in time frames established in Department web policies.
- No unopened emails for which the office is responsible are older than 2 business days.
- HUD partners report that email responses are courteous and responsive, demonstrating good customer service.

Review Methodology

- Prior to the onsite review, interview the Regional Web Manager

- During the review, ask to see the Web Manager mailbox for the State, and check to see if any unopened messages are older than 2 days. If it's a multi-office state, spot check the unopened messages to see if any appropriately belong to this office.
- During the review, ask to see responses to five random email messages from the public to verify that they are courteous and responsive.
- During the onsite review, interview
 - The Web Coordinator,
 - The FOD (or RD/designee),
 - 3 program managers,
 - 3 HUD partner organizations of various types (e.g., PHA, local government, nonprofits, lenders, etc.).

Interview Questions

Question for the Web Coordinator:

- Are you confident that Web Manager email is being answered in a timely, responsive, and courteous manner?
- Do you monitor the state mailbox daily to ensure that email is processed promptly?
- Do you monitor responses to email to ensure they are courteous and correct?
- Have you received any complaints from HUD customers about email response times or tone?

Question for the FOD (or Regional Director or designee):

- Are you confident that web-generated email is being answered in a timely, responsive, and courteous manner?
- Have you taken action to inform managers and staff in the Office of Department web policies related to managing web-generated email?
- Are you aware of any complaints from HUD customers about email response times or tone?

Question for program managers in the office:

- Do you hold your staff responsible for responding to web-generated email referred to your office in a timely, responsive, and courteous manner?
- Are you aware of Department web policies related to managing web-generated email?

Question for the Regional Web Manager:

- From your perspective, is this office handling Web Manager email promptly, responsively, and courteously?
- Have you monitored the state mailbox to ensure that email is being handled promptly?
- Have you received any complaints from HUD customers about email response times or tone?

Question for HUD partners:

- Have you ever contacted a HUD Web Manager through email? Was the response timely, responsive, and courteous?

APPENDIX K: QUALITY CONTROL

Quality Control Review Rating Form

Quality Control Review Checklist

Rater's Name: _____ Date of Rating: _____

Page (URL) reviewed: _____

Page owner (organization or region): _____

Instructions: Rate each standard on a scale of 1-5, 5 being the best.

Target audience is clear and unambiguous – does not attempt to address both citizens and partners (i.e., it is obvious who the page is intended for, citizens would not be confused by information intended for/appropriate to partners)

__5 __4 __3 __2 __1

Comments/suggestions:

Purpose of the page is clear and unambiguous (i.e., it is obvious what the page is intended to do)

__5 __4 __3 __2 __1

Comments/suggestions:

Writing (segues/narrative) is clear and unambiguous (e.g., words and terminology are appropriate to the target audience, content is conversational, no inappropriate jargon or acronyms)

__5 __4 __3 __2 __1

Comments/suggestions:

Content is formatted and organized efficiently (e.g., meets the KISS test, text is broken into short segments, uses headers and sub-headers to get people to what they want, layers information)

__5 __4 __3 __2 __1

Comments/suggestions:

Content is consistent (e.g., content doesn't contradict other information on the page or site, avoids duplication and redundancy except where it's needed to address different audiences, words/phrases mean the same thing throughout the page/website – consistent taxonomy)

__5 __4 __3 __2 __1

June 1, 2005

Comments/suggestions:

Spelling and punctuation are accurate. (One misspelling must be rated no higher than 4; 2 misspellings must be rated no higher than 3; 3 misspellings must be rated no higher than 2)

__5 __4 __3 __2 __1

Comments/suggestions:

Anticipates obvious questions (i.e., content shows that the writer(s) understand what the audience wants and needs)

__5 __4 __3 __2 __1

Comments/suggestions:

Links and graphics add value (if no links and graphics are included on the page, rate this "5")

__5 __4 __3 __2 __1

Comments/suggestions:

Page meets HUD's publication standards (which includes use of designated style guide)

__5 __4 __3 __2 __1

Comments/suggestions

APPENDIX L: USING THE 404 ERROR REPORTING APPLICATION

Whenever someone follows a link, types in an address, or uses a bookmark to access a page that doesn't exist, the web server generates an error (Number 404—File not found). We've set up this application to track all the 404 errors created by either the English (www.hud.gov) or Spanish (espanol.hud.gov) websites. You can use this 404 error reporting application to find broken links and, more importantly, find where the user is coming from when they get the 404 error.

Why should I use this application?

This reporting application will compliment the information you get in LinkBot reports. In fact, since this data is live (the data is pulled from the server when you run the report), you can check for errors without waiting for the monthly linkbot report.

Using the options listed below, you can discover:

- Are you linking to a page that no longer exists? Thereby causing causing a 404 error.
- Is someone linking to one of your pages that no longer exists? (In which case, you can check the "referring" Field to find out who and send them a mail message asking them to change the link.

How do I use the application?

To use the 404 error reporting application go to web management (<http://hudatwork.hud.gov/po/odoc/webinc/index.htm>) and click on the link for 404 errors under the tool box. (Since the actual 404 Error application sits on the www.hud.gov server, you can also access this report from anywhere you have access to the web (you don't have to be connected to HUD.) The reporting application can also be found at http://www.hud.gov/utilities/404error_viewer.cfm)

Report Options

You have several options in running the report:

- **Date Range**
We keep the 404 errors for the last 30 days. To select a date range, pick a starting date and end date. You will get a report of all 404 errors for the entire range between those dates. (Dates go from just after midnight through 11:59 for each day.)
- **Filter Criteria**
You can filter the results to narrow down what you are looking to find. Options are:
 - **IP Address** if you know the specific IP you're looking for (used for weeding out search engines)
 - **Browser type** if you're interested in whether one browser or the other is causing more errors
 - **HUD Server** here you can select either www.hud.gov for English content or espanol.hud.gov for the Spanish mirror.
 - **Output option**—You have the choice of sending the output to a web page (HTML) or to an Excel spreadsheet. For small reports—a day or two—the HTML version works fine. If you're looking at a larger range, or a large number of pages, the spreadsheet option will allow you to manipulate the data more efficiently.

- **Select Sort Criteria**

You can do some sorting right off the bat. Again, there are several options for sorting. (If you selected Excel as your output, you can do all these sorts in Excel.)

- **Date/Time** gives you a chronological listing of errors. This is particularly useful in identifying search engines and other automated accesses. (For example, it's not likely that an individual will create 50 404 errors in one minute. When you see this, it's probably an automated, e.g., search engine, access.)
- **Page that caused the 404 error:** This is the page someone tried to find and received a 404 error.
- **URL Variables**—these are the variables used by the database. For example, listserv name, state name, language variables, etc.
- **Referring page** if allowed by the user's browser, we also try to capture how the person got to the error. So, if they followed a bad link, the referring link should be listed here.
- **Browser**—again, you can look up by browser type—also useful for stripping out search engines which normally (although not always) identify themselves in the browser name. (E.g., MSIECrawler, <http://www.inktomi.com/slurp.html>)
- **User's IP address**—this is also useful for identifying search engines, etc. If you notice 75 404 errors in a short time period, it's probably safe to assume it's an automated system. (The 404 error reporting tool automatically strips out any IP address that creates 250 or more 404 errors in the same 24 hour period. This removes many of the more common search engines automatically.)
- **Server name**—This has the same effect as selecting the server name in the filter criteria above.

- **Sort Order**

This is pretty self-explanatory. You can have the output listed in either lowest-to-highest or (ascending, e.g., A to Z for alpha lists) or highest-to-lowest (descending, e.g., Z to A) order.