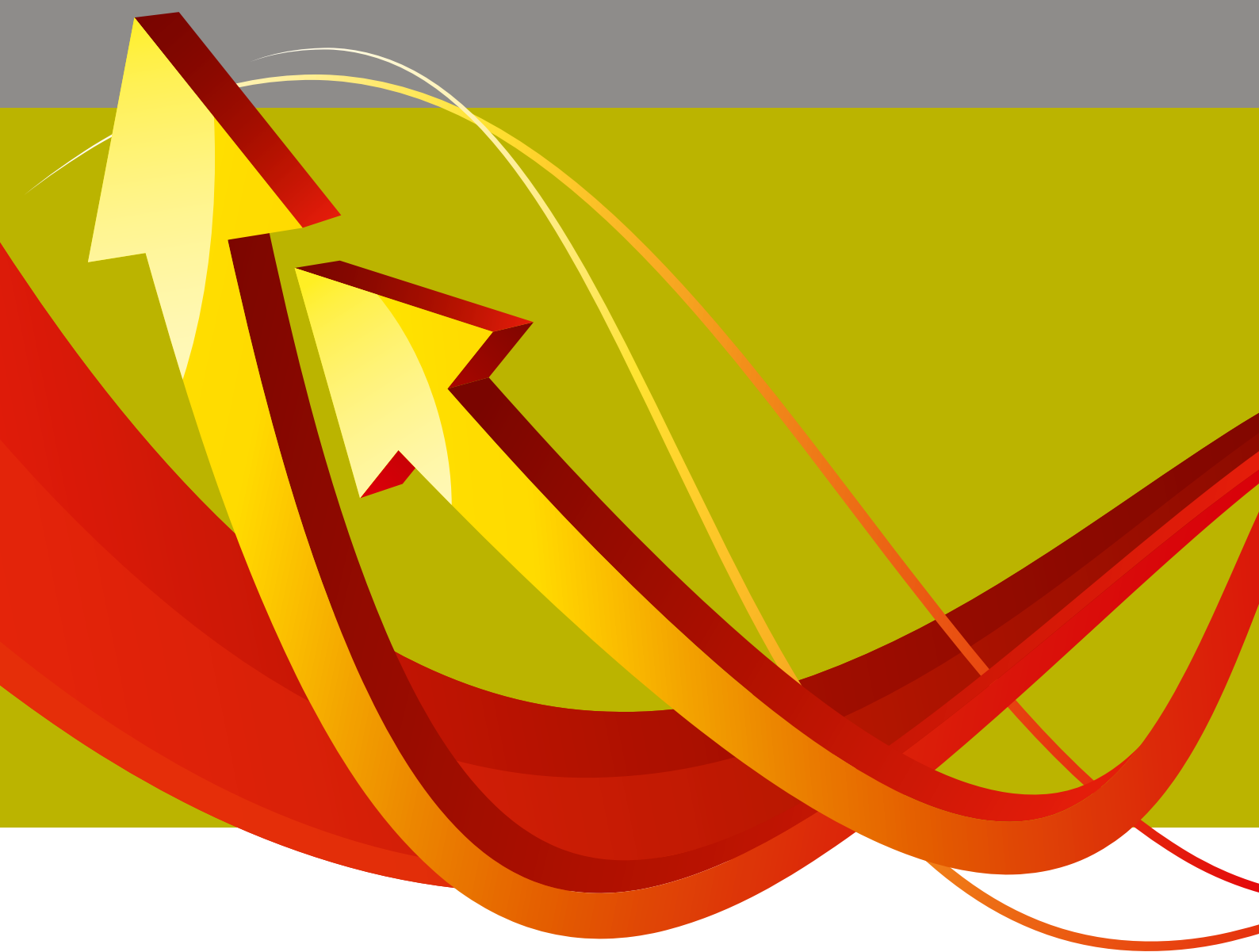


PAS 124:2011

Defining, implementing and managing website policies and standards

Code of practice



MAGUS™



Publishing and copyright information

The BSI copyright notice displayed in this document indicates when the document was last issued.

© BSI 2011

ISBN 978 0 580 71706 2

ICS 35.080; 35.240.30

No copying without BSI permission except as permitted by copyright law.

Publication history

First edition 2008

Contents

Foreword	ii
0 Introduction	iii
0.1 General	iii
0.2 What are website policies and standards?	iii
0.3 Key areas of website policies and standards	iv
0.4 The benefits	v
0.5 Current trends	vi
1 Scope	1
2 Terms and definitions	2
3 Defining website policies and standards	5
3.1 General	5
3.2 Definition workflow	5
3.3 Planning	7
3.4 Auditing and collating existing material	8
3.5 Gathering user requirements	9
3.6 Stakeholder consultation and management	9
3.7 Definition and documentation	10
3.8 Cross-validation	11
3.9 Stakeholder sign-off	11
4 Implementing website policies and standards	12
4.1 General	12
4.2 Impact of the publication platform	13
4.3 Determining the degree of template lock-down	14
4.4 Communication, training and support	14
5 Managing website policies and standards	15
5.1 General	15
5.2 Ownership and responsibility	15
5.3 Ongoing communication, training and support	15
5.4 Reviewing and updating	15
5.5 Monitoring	16
5.6 KPIs and data analysis	18
Annexes	19
Annex A (normative) Key areas of website policies and standards	19
Annex B (normative) Website governance policy	26
Annex C (informative) Useful sources of information	27
Bibliography	29



Foreword

This Publicly Available Specification (PAS) was commissioned by Magus, who provided the initial draft for development. Its development was facilitated by the British Standards Institution (BSI) and it came into effect on 22 March 2011.

Acknowledgement is given to the following organizations that were involved in the development of this PAS as members of the steering group:

- Cabinet Office
- LBi
- Magus
- Olswang LLP
- SDL Tridion
- Shell International B.V.
- Unilever PLC

Acknowledgement is also given to the members of a wider review panel who were consulted in the development of this PAS.

This PAS is published by BSI which retains its ownership and copyright. BSI reserves the right to withdraw or amend this PAS on receipt of authoritative advice that it is appropriate to do so. This PAS will be reviewed at intervals not exceeding two years and any amendments arising from the review will be published as an amended PAS and publicized in *Update Standards*.

This PAS is not to be regarded as a British Standard. It will be withdrawn upon publication of its content in, or as, a British Standard.

The PAS process enables a specification to be rapidly developed in order to fulfil an immediate need in industry. A PAS may be considered for further development as a British Standard, or constitute part of the UK input into the development of a European or International Standard.

Supersession

This PAS supersedes PAS 124:2008 which is withdrawn.

Information about this document

This is a full revision of the PAS and introduces the principal changes of additional procedural content on website governance, a new Annex B on website governance policy and an updated Annex A on the key areas of website policies and standards.

Use of this document

As a code of practice, this PAS takes the form of guidance and recommendations. It should not be quoted as if it were a specification and particular care should be taken to ensure that claims of compliance are not misleading.

Any user claiming compliance with this PAS is expected to be able to justify any course of action that deviates from its recommendations.

Presentational conventions

The provisions in this PAS are presented in roman (i.e. upright) type. Its recommendations are expressed in sentences in which the principal auxiliary verb is "should".

Commentary, explanation and general informative material is presented in smaller italic type and does not constitute a normative element.

Contractual and legal considerations

This publication does not purport to include all the necessary provisions of a contract. Users are responsible for its correct application.

Compliance with a PAS cannot confer immunity from legal obligations.

Introduction

0.1 General

Website policies and standards are the library of documents specified by an organization to govern the content, function and appearance of their websites and to articulate their website governance structure and process.

The remit for website policies and standards can be understood to cover traditional websites, mobile websites and external digital channels, such as web portals and social media sites.

Managed effectively, website policies and standards are powerful tools for controlling the process of website creation and publication and deliver tangible performance, operational and financial benefits. However, defining, implementing and managing website policies and standards presents organizations with common logistical challenges. Many organizations are also unaware of the extent to which they need to be defining them and the benefits that they deliver (see 0.4).

This Publicly Available Specification (PAS) provides recommendations to help organizations deploy website policies and standards efficiently and harness their full potential.

This PAS has six main parts:

- Defining website policies and standards (Clause 3);
- Implementing website policies and standards (Clause 4);
- Managing website policies and standards (Clause 5);
- Key areas of website policies and standards (Annex A);
- Website governance policy (Annex B);
- Useful sources of information (Annex C).

0.2 What are website policies and standards?

Website policies and standards are the two main types of documentation an organization uses to communicate requirements to the people responsible for commissioning, developing, managing and editing their websites.

Website policies and standards serve different but complementary purposes:

- A website policy is a high-level statement that outlines the organization's strategic requirements with regards to their website(s).
- A website standard is a detailed statement that sets out the specific criteria that need to be met in order to fulfil the website policy mandates.

The difference can be illustrated by the following examples:

- A website policy on accessibility states the target level of accessibility conformance for the organization's website(s). However, it does not explain how this target is to be achieved.
- Website standards for accessibility set out the specific criteria that are to be adhered to in order to meet the specified level of accessibility.

The differences between website policies and standards are outlined in Table 1.



Table 1 – Differences between website policies and standards

Document	Description	Use	Users	Purpose
Website policy	A high-level statement that outlines the organization's strategic requirements with regards to their website(s) Few in number Change rarely	To communicate the top-level strategy and requirements for the development and maintenance of a website	All organizational stakeholders in the website(s)	To protect the organization from risk and align their website(s) with their strategic goals
Website standard	A detailed statement that sets out the specific criteria that need to be met in order to fulfil the website policy mandates Many in number Change frequently	To guide web developers, managers and editors in the development and maintenance of a website	Web developers, managers and editors	To secure website quality and compliance and fulfil the website policy mandates

0.3 Key areas of website policies and standards

Website policies and standards are typically produced as a set of point-specific documents covering key areas, as given in Table 2.

Organizations often choose to document website policies alongside their related standards rather than produce them as stand-alone documents. This has the advantage of ensuring that each set of standards is presented within the context of its website policy mandate, which can increase understanding and buy-in.

Table 2 shows the key areas of website policies and standards as defined in this PAS. They include both organizationally specific website policies and standards (e.g. brand and website governance) and those referencing specifications by external agencies, such as governments and official standards bodies (e.g. legal and accessibility).

Annexes A and B provide recommendations on the key areas of website policies and standards.

Table 2 – Key areas of website policies and standards

Area	Cross reference
Accessibility	A.1
Brand and template	A.2
Co-branding	A.3
Domain name and URL structure	A.4
Editorial and copywriting	A.5
Legal	A.6
Search engine optimization (SEO)	A.7
Social media	A.8
Usability	A.9
Website governance policy	Annex B

NOTE This list of key areas of website policies and standards is not exhaustive and not all areas will be applicable to every organization.

0.4 The benefits

The benefits of website policies and standards are outlined in Table 3.

Table 3 – Key benefits of website policies and standards

Brand	• Reinforcement of the brand by ensuring consistency of brand presentation and messaging • Protection of brand and company reputation by ensuring a consistent, high quality user experience
Risk	• Minimization of online risk through compliance with legal requirements • Securement of appropriate protection of intellectual property
Financial	• Protection of investment in web-related projects by ensuring quality and performance is maintained on an ongoing basis • Reduction of development and maintenance costs through regulation and rationalization of the web development environment • Provision of access to the widest possible market, by ensuring compliance with accessibility guidelines and compatibility with target user platforms • Optimization for targeted customer acquisition due to the effective localization of content • Increased visitor traffic through optimization of content for search engines • Increased user confidence through a consistent, high quality user experience
Workflow efficiency	• Increased agility and reduction of time to market, through streamlined development and maintenance processes • Communication and enforcement of best practice across web teams and the organization as a whole and reduction of dispute • Simplification of design and build processes of new or redesigned sites, particularly in relation to the management of multiple suppliers
Performance measurement	• Provision of objective criteria for measuring performance towards compliance targets • Increased reliability of visitor and performance data through the consistent application of traffic tags

0.5 Current trends

The web has matured to be a business-critical medium, achieving increased recognition and support at board level. This has been boosted by the economic downturn where the superior audience reach, efficiency and measurability of online media have commanded an increasing slice of organizations' marketing budgets.

Website governance systems and processes are also maturing. Organizations are increasingly moving from manual to automated quality assurance processes to enable them to keep pace with the speed and scale of publication, and are making sophisticated use of compliance metrics to drive improvements in their websites and inform strategy.

However, many organizations have been slow to embrace effective governance systems and processes, with the result that serious website standards compliance problems continue to undermine user experience, damage brand and put organizations at risk. Current trends are set to amplify the website governance challenge, as websites are becoming ever more complex and dynamic.

Key trends and challenges:

- Websites are incorporating an expanding array of content sources and publication platforms, such as blogs and user-generated content, all of which need to be brought under the website governance umbrella.
- Content is increasingly localized, personalized and dynamically targeted, which leads to an expansion in the number of digital touch points that need to be monitored and managed.
- The remit for website governance now extends beyond the website to cover a proliferation of external digital channels, such as web portals and social media sites.
- There is an increased speed and volume of publication.

Effective website policies and standards, and website governance, are key to enabling organizations to exploit this increasingly agile environment, without sacrificing control over brand presentation and messaging or increasing their exposure to risk.

1 Scope

This Publicly Available Specification (PAS) provides recommendations for defining, implementing and managing website policies and standards.

This PAS is applicable to all types of organization (including public and private companies, non-profit organizations, government departments, local councils, public sector organizations and academic institutions).

NOTE *Although the guidance contained in this PAS is relevant to any organization with a website (including public websites, intranets or extranets), the scope of the recommendations are most directly applicable to organizations with enterprise-scale websites.*

This PAS is for use by:

- organizations considering, planning, or in the process of developing, website policies and standards;
- organizations with existing website policies and standards wishing to align themselves with best practice methodologies;
- organizations looking to improve or articulate their website governance structure and process.

This PAS can be used by anyone who manages or has responsibility for a website. This could include:

- global communications teams;
- marketing teams;
- corporate communications teams;
- brand guardians;
- website managers;
- external agencies responsible for defining and/or managing website policies and standards;
- IT managers, especially those involved in setting up a content management system (CMS);
- legal/compliance/IT risk teams.

This PAS is intended to be independent of the underlying publication platforms and technologies used in the creation of websites. It can therefore be used to inform the definition and deployment of website policies and standards for all types of website including: static websites, dynamic websites, web portals, mobile websites, e-commerce websites and content published by organizations on external sites, such as social media sites.

This PAS does not cover website policies and standards for the following types of web-based services and applications: “software-as-a-service”/cloud computing services, virtual learning environments and internet-enabled “widgets” and applications (e.g. mobile applications).

This PAS does not cover the following types of technical standards: infrastructure standards (e.g. connectivity, performance and availability), security standards, code standards or the use of semantic web technologies.



2 Terms and definitions

For the purposes of this PAS, the following terms and definitions apply.

2.1 accessibility

degree to which people can perceive, understand, navigate, contribute to and interact with web content and functionality, regardless of disability or the web browser, technical platform and access device they are using

NOTE The concept of accessibility addresses the full range of user capabilities and is not limited to users who are formally recognized as having a disability.

[adapted from BS 8878:2010, B.1.1]

2.2 assistive technology

hardware or software added to, or incorporated within, a system that increases accessibility for an individual

NOTE 1 This includes all such software which is either: installed into the operating system (executable extensions or applications), installed into the browser (plug-ins), or included on the website.

NOTE 2 Examples include the provision of screenreaders and text to speech systems; screen-magnification software; tactile Braille display, trackballs, touch pads/ screens, etc.; alternatives to standard computer mice, keyboards, switches and speech recognition software.

NOTE 3 Also referred to as “access technology” and “adaptive technology”.

[BS 8878:2010, B.1.3]

2.3 automated compliance testing tools

software applications used, without direct human intervention, to assess whether a website is standards-compliant

2.4 cascading style sheets (CSS)

mechanism for adding style, layout and presentation (e.g. fonts, colours, spacing, positioning) to web documents

NOTE CSS enables the separation of content from the way it is presented to users.

2.5 content management system (CMS)

software application that provides facilities to create, manage, store and publish web content

NOTE There are many varieties of CMS designed to manage different content types. For the purposes of this PAS, the term CMS is primarily used to refer to web CMSs – a type of CMS that is concerned with the management and publication of web content. However, the boundaries between different types of CMS are blurred and other types of CMS include web content management as part of their wider service offering. The term can therefore be understood to include other types of CMS (e.g. enterprise CMSs) that provide integrated web content management functionality.

2.6 contributor

person who contributes to the content, code or design of a website on behalf of the organization as distinct from a person who adds content in a private capacity

NOTE Adding content in a private capacity includes, for example, commenting on a blog posting.

2.7 common publication platform

centrally provided CMS that is shared across an organization, along with the associated web services and technical platform

NOTE Compare definition of common publication platform with diverse publication platform (see 2.9).

2.8 disability

physical or mental impairment which has a substantial and long-term adverse effect on a person's ability to carry out normal day-to-day activities

NOTE This definition is based on the definitions of disability contained in the DDA [1] and the Equality Act 2010 [2].

[BS 8878:2010, B.1.4]

2.9 diverse publication platform

dispersed website infrastructure comprising a variety of CMS (and other website publication toolsets), technical platforms and web services

NOTE Compare definition of diverse publication platform with common publication platform (see 2.7).

2.10 domain name

unique name that identifies an organization, website or other entity on the internet

NOTE Domain names are made up of one or more segments, termed “labels” that are organized hierarchically and separated by full stops, for example, “ourcompany.com”.

The hierarchy of domains descends from the right to the left. The right-most label represents the top-level domain. For example, the domain name “www.ourcompany.com” belongs to the top-level domain “com”. Each label to the left specifies a subdivision (or subdomain) of the domain to the right. For example, the label “ourcompany” specifies a subdomain of the “com” domain and “www” is a subdomain of “ourcompany.com”.

2.11 editor

person who contributes to or makes editorial changes to the content of a website on behalf of the organization

2.12 information architecture

organization, labelling and navigation schemes which make up the information system of a website

2.13 key performance indicator (KPI)

pre-agreed, quantifiable measurement that is used to measure progress towards identified goals

NOTE Also known as “key success indicators” (KSI). KPIs are different to “critical success factors” (CSFs).

2.14 localization

adaptation of a website to make it appropriate to the target locale (country/region and/or language)

2.15 rich media

media that consists of any combination of graphics, audio, video and animation

2.16 search engine optimization (SEO)

process of planning, implementing and maintaining a website’s information architecture, content and underlying technology so that its pages rank higher in relevant organic search engine results

2.17 semantic web

group of technologies and methods that enable computers to understand the meaning of information on the web and to link, search, share and combine data in useful and interesting ways

2.18 technical platform

computing environment with a particular user or programming interface, including hardware and operating system, supporting execution of application programs

[adapted from ISO/IEC 18019:2004, 2.42]

2.19 template

pre-specified layout to which editors may add content in controlled ways to produce a completed web page matching organizational design standards

NOTE Typically a template consists of sections of code that are locked and others into which content can be added.

2.20 uniform or universal resource locator (URL)

address of a file, web page or other resource on the internet, combined with information about how to access it

NOTE 1 A URL contains both a domain name (see 2.10) and a protocol (see Note 2), for example, in “http://www.ourcompany.com/folder/filename.html”, the domain name is “www.ourcompany.com” and the protocol is “http://”. If the resource is a specific file, the URL also includes its path, in this example, “/folder/filename.html”.

NOTE 2 A protocol is a method of exchanging data on the internet. In a URL, the protocol “http://”, for example, indicates that the file needs to be accessed as a web page, whereas “ftp://” indicates that it needs to be obtained by file transfer.

2.21 usability

extent to which a website can be used by specified users to achieve specified goals with effectiveness, efficiency and satisfaction in a specified context of use

[adapted from BS 8878:2010, B.1.14]

2.22 user

end user of a website

2.23 website

set of interconnected web pages, images, or other digital assets that are addressed relative to a common uniform resource locator (URL) and delivered to users via internet protocol, through a web browser

NOTE Websites can be viewed on different internet enabled platforms, including computers, mobile phones and other internet enabled devices such as eBook readers, tablets and televisions.

2.24 website governance

framework of strategy, people, roles, responsibilities, policies, standards and processes involved in managing an organization's website(s)

2.25 website life cycle

four stages of a website's life: inception, growth, stabilization, end-of-life

NOTE In the end-of-life stage a website is considered no longer fit for purpose and the cycle is initiated again with the launch of a new website designed to meet the organization's current needs. An organization's old website can be archived at this stage.

2.26 website policy

high-level statement that outlines the organization's strategic requirements with regards to their website(s)

2.27 website standard

detailed statement that sets out the specific criteria that need to be met in order to fulfil the website policy mandates

NOTE The term "website standard" is differentiated in the context of this document from the term "web standard". The term "web standard" is commonly understood to refer to code standards, established by the World Wide Web Consortium (W3C) (see Annex C) and other standards bodies, for the creation and interpretation of web-based content.