

Exception Request for COIT Policies or Standards

This form provides COIT with the information needed to analyze requests for exceptions to COIT policies, standards, procedures or approved products.

Title:

COIT Website Policy

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Urgency of Request:

Our goal is to launch Phases I and II of the Library's redesigned website before June 30, 2008; we had hoped to begin the project by the beginning of March 2008.

Please provide the following information. The responses can be as long as needed. Additional information can be attached and referenced.

1. Identify the specific elements of the policy or standard from which the organization is requesting an exception.

There will be one website for the City managed under the direction of the Department of Telecommunications and Information Services (DTIS). All City Departments will:

- Host and update web sites using the City's web content management system maintained by DTIS.
- Own published content and be responsible for maintaining their web sites using the City's web content management

2. Provide a description of the proposed solution or technology that is being requested, including technical details.

The San Francisco Public Library has hosted and maintained a public website since 1994. A usability study, conducted four years ago, led to a small-scale re-design. Today, the SFPL website (www.sfpl.org) contains well over 4,500 html pages, plus other file types (such as PDFs). The main English language site also has translated versions in Spanish and Chinese. The Library's site includes the Library's Catalog, a large interactive database (*Millennium*) for the Library's holdings of books and other media. *Millennium* is produced and developed by

Innovative Interfaces, Inc., but SFPL designs the Catalog screens and supplies the content for it (MARC-based library catalog records and customer records for check-out of materials). *Millennium* serves as a key function on our site, provides many self-service customer features, resides on a separate server, and has both public and staff views since it serves as our Integrated Library System.

SFPL's Web site represents all collections, services, and programs offered by the Library, and therefore has to fill a complex set of needs. An additional, somewhat unique challenge, is that the Web site and Catalog simultaneously serve remote users (71%) and customers on Library premises throughout its 29 branches (29%). The public website receives 12,000,000 page hits per year; its Spanish and Chinese websites receive 450,000 of those page hits. Patrons have access to 106 subscription databases that received 1,689,242 searches in FY2006/07 via the Library's website; The Library's Web audience is comprised of the broadest spectrum of the general public, particularly in the local and regional area, and includes age ranges from elementary school students to seniors (including teens and college students). Socioeconomic backgrounds are also extremely diverse, and computer skills of users range from very low to highly sophisticated. This makes branding and targeting audience needs a particular challenge. Parts of the site have target audiences by age groups such as the Teen and Kids pages.

SFPL proposes to redesign its public website to enhance its usability, effectiveness, functionality and appeal to all its audiences. The redesign will also provide a content management tool to enable librarians throughout the 29 library sites to contribute and edit contact with ease and in a timely fashion to support the myriad local programs and events. The project will consist of three phases:

- Phase I - Information Architecture and Interaction Design: Create 8 page layouts including Home page, Category Root, Sub-Category, End-of-Tree, three pages selected by client and one blank template page. Create site map and global headers and navigation elements. Seven (7) weeks for completion. Deliverables will include source files for all wireframes as well as PDF copies.
- Phase II – Visual Design: Create visual designs based on the approved wireframe pages. Create visual design styles for the story editor elements. Six (6) weeks for completion. Deliverables will include Photoshop source files for all pages as well as specifications for html with all optimized image files.
- Phase III – Html, CSS and Content Management Tool Development: Create structured templates and story editor elements based on approved wireframes and visual designs using open-source LAMP technologies. Set up users & privileges based on predefined list provided by SFPL staff. Instruct staff on use and creation of additional pages using the CMS editorial tools. Instruct staff on administrative features of the CMS tool. Specific web site features will include RSS 2.0 subscription support, library room reservations, library event registration, and basic handheld device design. 12 weeks for completion. Deliverables will include all LAMP, CSS, and HTML source code and associated files for templates and editor UIs.

Some details of the proposed CMS tool are described as follows:

The content management system (CMS) provides a password-authenticated online environment where users can collaboratively administer site content. Site content can conceptually be broken out into two groups - structured content - a branch listing, an image gallery, list of newspapers by

city, meeting rooms, events, section directories, etc. - and more singular or unique pages. Structured content will use customized, easy to use forms to gather data and author into specialized templates for publishing and display. Unique pages will offer several options to meet the range of needs. A story editor will allow elements to be created that conform to the established design guidelines. This will make it easy for anyone to author content without entering a single HTML tag or having to worry about other architectural elements such as navigation menus. Additionally, the site will better maintain look and feel as it grows. Each story has an author, and an author can quickly see their list of stories for easy editing. For cases where more granular control is desired, pages can alternatively be edited as HTML. Pages can also be authored as positioned iframes, allowing incorporation of outside databases or other cases where server-side scripting may be desirable.

Editorial control is provided, allowing review before publishing according to individual user or group privileges. The system will provide automated and manual keyword tagging of content, improving both search within the site and indexing of the site by search engines. As the site is built from the original templates instead of hundreds of individual pages, design updates are centralized and easy to implement. The system can be easily extended – additional structured areas or story editor elements can be added as needed.

Addressing SEO, keyword metadata would be automatically created and can also be manually overwritten, in either case, this metadata would be used both to optimize internal site searches as well as search engine indexing as these would be written out as meta tags.

All of the non-structured pages would offer a template choice supported by the CMS UI, e.g., if it's a two-column layout with a sidebar, we'd present three entry points accordingly, or three 'stories'.

RSS 2.0 subscription support for each event publishing placement (main, kids, branch, kids/branch, etc.) and language combination, plus one overall feed with latest events. Subscription icon will be displayed as a standard event list or detail element, linking the visitor an overview displaying the selected list subscription as well as revealing all other language-appropriate feeds available.

Room reservation interface and data structures to list and edit rooms, reservations, and hours of availability during the week (e.g., weekend hours). Meeting rooms along with their descriptions and images will have their own process, and will also be presented as a tab within events to consolidate event listing, room reservations, and (optionally) event registrations into a single, easy to use display. Rooms can be reserved (and events created for) both public events as well as internal events to reserve room space. Each room can also have it's own defined 'buffer' period between meetings or events to ensure smooth scheduling. Meeting rooms will be cross-linked with events, providing a useful reference for participants.

Extension of event system allowing participants to register for events online. This will work both as part of an event entry as well as a stand-alone process, providing a searchable opt-in mailing list. Each participant selection can also be exported as an Excel spreadsheet for further processing or collaboration if desired. Event managers can select optional fields to display in addition to the basic entry model; system will produce HTML form code that can then be used to create a stand-alone page or for use as a page element on the event detail page. This extension of the CMS system will process and store all submitted registrations, returning a customizable thank-you page. This will also enable entry of event capacity and ensure that event registration does not exceed either room or event requirements; a customizable 'sorry' message will be displayed to overflow registrants.

Apache scripting, XHTML, XHTML-MP, and CSS necessary to effect basic branded handheld design template (visual design not included), offering usable overview of library events with meeting room and driving directions as well as operating hours and locations. Where appropriate, handhelds can also support click-to-dial location phone numbers.

In conjunction with the project, SFPL has established a Website Redesign Advisory Task Force, comprising staff members from all public service divisions to aide and advise the SFPL Web Team during the re-design. The Task Force shall review and provide feedback during each phase on the presentation, organization, and effectiveness of proposed new pages, layouts, and design elements. The TF shall also review the usability and effectiveness of the content management tool and page creation templates; including the ease of adding and editing new and existing content, the work flow, the functionality of existing and desired features, and the needs of SFPL's public and staff end users.

3. Explain why the policy or standard exception is needed and the consequences if the exception is not approved.

The Library has a very rich website with 4,500 pages. Most contemporary sites of this magnitude use a content management system to generate dynamic pages to make updating of repetitive information easier on staff and to deliver up-to-date relevant services. Most major metropolitan public libraries maintain their own dynamic websites, including those jurisdictions that have implemented enterprise-level content management systems: e.g.:

Los Angeles Public Library
Phoenix Public Library
Seattle Public Library
San Jose Public Library
Ann Arbor Public Library
Queens Borough Public Library
Houston Public Library
Multnomah County Library

The Library needs to keep up with users' ways of accessing and using information; it needs to be viable to its users and responsive to user needs by delivering content in all varieties of formats: print, online, e-audio, e-books, databases, digital photographs, and e-video. The Library needs to meet the demands of today's web-savvy users as well as those whose first experience with a website is the Library's. It should serve its patrons through IM, blogs, RSS feeds, as well as through the traditional means.

Librarians are trained as professional organizers of information, and the public perception is that the Library is considered a storehouse for information. Managing electronic content is no different than managing content stored in books, periodicals, newspapers, microfilm, microfiche, audio, video, etc. Moving our content off-site, and allowing it to be managed outside the purview of librarians and library IT professionals violates the public's trust in the institution and its mission, and diminishes the role of Library staff as guardians of public information.

SFPL staff spent nearly a year planning this project: conducting research, assessing user needs, and defining specifications and requirements. SFPL has consulted with its DTIS Project Manager on the goals and scope of the project and has followed DTIS advice on how to proceed. All of this work took place prior to the issuance, and SFPL's awareness, of the COIT Website Policy on January 17, 2008.

If the project as proposed is not approved, the Library's service to the public service would be impacted:

- The CCSF's content management system is described as unstable: "software is being stretched to its limits. The existing web content management system architecture is also quickly aging and reaching end of useful service. The risk of failure in the next 18 months remains very high."
- The City's website is unable to support our Chinese language web pages and we have not received confirmation that our Spanish language web pages can be supported. Nor are we certain that we could plan to add web pages in other non-English languages.
- Library patrons—particularly those new to the web—would have difficulty distinguishing between library and non library content if the Library's website were incorporated into the City's website: For example, the Online Services and Search functions may confuse patrons who just want to access library resources and the library catalog.
- Timeliness for uploading and editing content may be an issue if there is a review process for contributing content.
- The Library is starting to plan for multimedia content to be included in the website. This might consist of audio, video, flash, or other software. The Library website is being redesigned to accommodate this rich content, and our bandwidth to the Internet has been increased to meet our growing public demands for these services. The City's website is not in a position to incorporate multimedia content.

If the Library were to postpone our web redesign project for DTIS to replace the current content management system, the time frame would not be aligned with our 2008-09 initiatives. As we develop our Virtual Library initiative we are consolidating and expanding our online services to the public. Our website must be nimble and flexible as well as streamline processes; it must provide usability and a positive user experience for both library staff and visitors. The proposed content management system will be a tailored solution for the Library so that librarians can spend more time focused on delivering services rather than being web developers.

4. Describe the financial impact to the department if the exception is granted and if not granted?

SFPL has received a very competitive proposal for completing this project that falls within the Library's FY2007/08 operating budget. The budget for this project was supplemented by Board of Supervisors' Resolution No. 692-07, authorizing the SFPL to accept and expend two gifts in the amount of \$20,000 and \$12,000 for the enhancement of the Library's public website. If the exception is granted, SFPL would proceed to work with the Computer Store Microgear's proposal with Desite to redesign the Library's website.

If the exception is not granted, the library's investment of hundreds of staff hours in planning for this re-design over the last 11 months will have been lost. The anticipated increased use of services through the redesigned library website would not materialize. This is not good stewardship of taxpayer dollars and public resources.

5. Explain why is it in the best interests of COIT to grant the exception?

It is in the best interest for the citizens of San Francisco to have a first class state of the art web site, especially after they overwhelmingly showed their support of the library in the last

election. The library has the funds for this re-design and believes that the design team doing the work would give us good value for our dollars; even adding features "pro bono" simply because it believes in the library's mission.

6. Describe how granting, or not granting, the exception impacts the agency IT plan.

The exception impacts the following elements of the Library's Technology Plan:

- Provide an inviting web presence and experience for both public and staff users of the library's website and online resources
- Ongoing
 - E-books and downloadable e-audio books available
 - A large array of online databases available
 - Online access to a rich resource of digitized files, such as San Francisco historical photos, sheet music, online exhibitions, etc.
 - Interactive online services, such as e-mail and live online reference, and live online homework help
 - Children's instructional games available through dedicated Educational Discovery Center computers
- FY2008/09 +
 - Explore alternatives to dedicated Educational Discovery Center computers and implement alternative solution as needed
 - Explore an appropriate electronic resources management system to keep track of our e-journal subscriptions and licensing information.
 - Evaluate new Millennium products as introduced and implement those which provide appropriate and enhanced delivery options
- Ensure the Library's resources are findable
- Completed 2006/07:
 - Enhanced searching features, such as relevancy ranking, spell check, and patron ratings are now available in SFPL's catalog
- FY2007/08
 - Install and implement Encore, a discovery services platform that provides enhanced OPAC (Online Public Access Catalog) searching features (early 2008)
 - Redesign SFPL website to enhance the usability and navigation of the public web site, install a content management system, and create a new visual design.
- FY2008/09 +
 - Add features to Encore as they are made available and as they are appropriate, e.g. community tagging,
 - SFPL website redesign to be continued over 2008/09
 - Develop an online calendar of programs and library events with RSS feeds and a meeting room booking system for the public and staff
- Place library links and/or resources where users may find them
- Completed 2006/07
 - SFPL's database of digitized historical photographs and community services directory are now indexed by search engines, such as Google
 - Created a Children's Films database, Children's Performers database and Wiki, and Information Services Wiki
 - Instant messaging options for interaction between reference librarians and library patrons identified
- FY2007/08

- Explore and implement as appropriate relevant web tools, such as RSS feeds from the catalog, open source software appropriate for library applications
- Explore and implement as appropriate software tools appropriate for internal and external blogs, forums, and polling
- FY2008/09 +
 - Realign organizational structure to create a Virtual Library to encompass electronic resources and services, public web site and intranet
 - Create staff position to plan, research, develop logic, code, test and deploy several Web projects.

7. Describe granting, or not granting, the exception impacts the organizations policies, standards, procedures, guidelines, finances, etc.

In FY 2008/09 the Library has defined priority areas, goals and objectives that direct department-wide work planning and performance management, across the individual programs. The proposed tailored solution for the Library, as well as the Library's 15 years of expertise in hosting and maintaining its website, would ensure uninterrupted and enhanced service to its users, as outlined in the Library's priority areas below. Many of the extra features planned for our re-design—including an events calendar, room booking service, program registration module, the children's and teens summer reading registration—would further enhance the Library's appeal to users.

Priority Area	Goals
Public Services and Outreach	1. Improve access to library resources through expanded service hours and enhanced outreach efforts 2. Market library services and programs for greater public awareness 3. Enhance programs and outreach targeted to children and teens (Partnership with SFUSD and DCYF) 4. Sustain and enhance collaborative relationships with community based groups and library stakeholders
Library Collections	5. Develop and maintain strong library collections responsive to diverse community needs
Public Technology*	6. Provide technologies and a robust IT infrastructure, including public computers and Wi-Fi, to access library and internet 7. Provide direct service to the public via the Library's web portal, virtual library, online public catalog and e-resources
Staff Development	8. Develop and augment training opportunities to promote staff growth and skill-building 9. Provide opportunities for training and development of leadership skills and competencies

Public Safety & Security	10. Provide safe and welcoming library facilities
Resource and Asset Management	11. Develop a comprehensive asset management plan for library facilities 12. Continue to develop Green Libraries Initiative in partnership with SF Environment, including both capital improvements and a public education campaign
Facilities Improvement Program	13. Achieve successful progress on the Branch Library Improvement Program

***Goals 6-7: Public Technology:**

Provide access to technology, including WiFi, web portal, virtual library, and e-resources.

Provide robust IT infrastructure to enhance patron experience and access.

Library computers and electronic resources are a vital public asset. The following actions will help ensure that these resources are provided equitably, that the technology provided offers the best possible user experience, and that the Library has a strong IT infrastructure for meeting public and staff demands for technology:

- Provision of access to information technology to help bridge the digital and information divide, including hardware, connectivity, software, and an enhanced web presence that makes services available 24/7;
- Promotion of a variety of electronic services, such as homework help tutorials to students and community at large;
- Installation of fiber-based service for the network and to ISP;
- Maximized availability of all systems;
- Coordination with the City's IT initiatives to provide network security and disaster recovery;
- Installation of Wi-Fi management tools throughout the system and replace outmoded Wi-Fi access points at Main;
- Ongoing programmatic refreshment of technology equipment;
- Redesign of SFPL website to enhance usability, navigation, and visual appeal;
- Exploration and assessment of relevant technology service innovations and tools;
- Implementation of enhancements to the Library's online public access catalog (OPAC) and other services of its integrated library system, Millennium, and self-service tools for users;
- Maintenance of and enhancements to SFPL's intranet, StaffNet;
- Participation in e-rate program, which provides discounts for telecommunications services.