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| <b>Name:</b>       | <b>Web Policy and Procedures</b>                        |
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## **Preamble**

This policy will follow the Strategic Directions set forth by the President and will support the Academic Plan, the Research Plan and the University's marketing and communication requirements. This policy shall:

- 1) Apply to all web pages owned by Saint Mary's University, within the public domain of web pages;
- 2) Apply to all users of the Saint Mary's University Website and other closely-related microsites; and
- 3) Be reviewed annually and revised as necessary.

Members of the university community and users of the web presence should understand that University websites will be under continuous renewal and typically change in an evolutionary fashion.

Other policies affecting this policy must be observed including: Policy on Information Technology, University Email Procedures and Guidelines, Policy on Prevention and Resolution of Harassment & Discrimination and other University policies. This policy shall not supersede any Executive mandate direction whether announced or otherwise.

Web pages not owned by Saint Mary's University (i.e. personal pages, society pages, partner pages, external conference pages, etc.) are not required to follow this policy but will continue to follow the current policy on Information Technology and other University Policies.

This policy does not apply to the Saint Mary's University Intranet.

## **1.0 Web Policy**

### **1.1. Website Ownership**

The main Saint Mary's University website (smu.ca), and closely related microsites, comprise a major share of the University's public digital identity and are therefore very important elements of the University's identity and brand.

Responsibility for the websites is held by the Executive Management Group (EMG) with the Vice-President, Advancement as the Executive Sponsor. Operational oversight is held by the Associate Vice-President, External Affairs in partnership with the Senior Director, Information Technology Systems & Support.

The external web presence (as seen by the public) will have a coordinated message drawing from the strategic directions, academic plan, the University's marketing and communication requirements, and other initiatives as determined by the EMG. The Executive Sponsor will be responsible for assuring message coordination.

Web work will meet the university Brand Standards as defined by the Associate Vice-President, External Affairs.

## **1.2. Shared Responsibilities**

The ongoing development of the Saint Mary's University web presence is a shared responsibility between External Affairs, Content Owners, and ITSS.

External Affairs is responsible for ensuring a digital-first approach, brand positioning, design principals and templates, and the primacy of the user experience. External Affairs will set goals and benchmarks for the website so that EMG can assess the contribution of the website and digital campaigns to the strategic priorities of the University, with special consideration given to Recruitment and Advancement at Saint Mary's.

The Web Team, under the leadership of the Manager of Digital Experience, will work with Content Owners in Faculties and Administrative Departments to renew web content and ensure that web content for their respective areas is timely, accurate and generally supports a positive user experience. Further, Content Owners will ensure the regular sharing of relevant content (e.g. news, events) across other digital channels where appropriate.

At times, the Web Team will also include other members of External Affairs and ITSS, as required for specific projects.

As partners in responsibility for the Saint Mary's University web presence, ITSS will provide a secure infrastructure for the website and related web projects.

ITSS will provide ongoing support and advice on web-related project planning as well as technical support for major initiatives.

## **1.3. Governance**

The governance of the overall Saint Mary's website is shared by multiple levels as described briefly in this section. Further details of organizational roles are provided in Section 3 Organizational Roles Details.

1. Overall responsibility for the website lies with the Vice-President Advancement as Executive Sponsor.
2. The Web Advisory Committee, under the leadership of the Executive Sponsor, will regularly review web performance and priorities and make recommendations to EMG regarding significant web-related investments and resource allocation. The membership of the Web Advisory Committee will consist of the Vice-President Advancement (chair); Associate Vice-President, External Affairs; Associate Vice-President, Enrollment Management & Registrar; Director, Admissions and Recruitment; Senior Director, ITSS or Assistant Director - Client Services, ITSS; Manager, Information Systems and Services, ITSS; and Manager of Digital Experience, External Affairs.

3. The Associate VP External Affairs is responsible for the Brand positioning, the university key messages, design and writing standards.
4. The Manager of Digital Experience is responsible for creating an annual Digital Experience Strategic Plan (to be approved by EMG) and overseeing its implementation by a Web Team based in External Affairs, Web Content Owners across campus, ITSS, contracted service providers, and other staff and faculty as required.
5. Deans are content owners for Faculties, Academic Departments Schools Institutes, and Centres. Throughout this policy, reference to content owners of Faculties includes their responsibility for Academic Departments, Schools, Institutes and Centres within the Dean's mandate. Directors of Administrative Departments are the content owners for their Departments. Throughout this policy, reference to content owners of Departments is to Directors of Administrative Departments. Content Owners will be accountable and responsible for the websites under their organizational control as granted by the EMG.
6. Senior Director, ITSS, is responsible for the planning and provisioning of the required infrastructure, software and supports for the ongoing development of the Saint Mary's web presence.

## **2.0 Organizational Role Details**

### **2.1. Faculty and Administrative Departmental Roles**

Each university faculty and administrative department will have:

- A Content Owner (the Faculty Dean or Administrative Department Director).
- An Editor (Assigned by the Dean or Director).

Faculties and Administrative Departments shall coordinate all web-related work with the External Affairs Web Team to ensure the consistent application of the policy and web design guidelines.

Faculties and Administrative Departments can also call upon Web Team resources as necessary for the development of their content.

Faculties and Administrative Departments requesting the services of a third-party web development organization or individual may do so. However, they must coordinate their effort with the Manager of Digital Experience to ensure such work complies with this policy and meets the technical requirements set out by ITSS, and to ensure it conforms to the University brand standards.

Detailed descriptions of these roles are described here:

### **2.1.1. Content Owner (Dean or Director)**

The Content Owner for each Faculty or Administrative Department is responsible for ensuring the Web Policy and procedures are adhered to.

A Dean or Administrative Director may delegate content ownership.

Typically, any Faculty or Administrative Department with a Communications Officer or similar position, will delegate responsibility to that person. Regardless of Content Owner delegation, the Dean or Administrative Director maintains ultimate responsibility for the Faculty or Administrative Department content.

More specifically, the Content Owner will be Responsible for:

- Reviewing and approving content for their department or Website within Web design guidelines. The content owner is accountable for the information and material within their web area. This includes content, navigation, organizational outline, references, and links to external pages/Websites. These Web pages shall meet the standards described within this Web Policy.
- Ensuring that the website content is current and refreshed regularly to reflect the Faculty or Administrative Department requirements and image.
- Assigning the role of Web Editor/Writer to an appropriate individual within the Faculty or Administrative Department.
- Notify the Manager, Web Services and the Manager of Digital Experience of any changes to Web Editor or Web writers.
- Supervising Web Editors/Writers work.

### **2.1.2. Web Editor**

The Web Editor will be assigned by the Content Owner and will be responsible to follow the Web policy and design guidelines and be responsible for writing and/or editing at the faculty and departmental level. The Web Editor will facilitate content creation for their department and coordinate their activities with the Web Team. Where no appropriate and permanent Web Editor can be assigned, the role of Web Editor will be filled by the combined efforts of the Manager of Digital Experience Web and Web Team until a Web Editor is available to take over these duties.

More specifically, the Web Editor will be responsible for:

- Acting as the Faculty or Administrative Departmental contact for the Manager of Digital Experience and Web Team.

- Editors will write and edit content to departmental websites using the approved content management system in a manner designed and optimized for the web.
- Writing, editing, proofreading of content published on the website
- Ensuring style guides are followed, including grammar, spelling, appropriate content matter, optimization for disability aids, and consistency of content published on the website.
- Facilitating the development of timely and consistent internal Faculty or Administrative Departmental content
- Ensuring that the website content is current and refreshed regularly
- Coordinating and reviewing the work of Web Writers, approving content changes, and providing training and support to new Web Writers within their Faculty or Administrative Department.

## **2.2. Administrative Roles**

### **2.2.1. Executive Sponsor (Vice-President, Advancement)**

The Executive Sponsor will be responsible for developing and implementing the Saint Mary's University Web Policy and ensures the web presence adheres to the strategic directions of the university by:

- Chairing meetings of the Web Advisory Committee
- Being the Content Owner of the University front pages and landing pages on behalf of EMG.
- In all cases of disagreement between what is considered acceptable and non-acceptable content, outline or reference, the VP Advancement will present the issue to EMG, which has complete authority to make the final decision on whether or not to publish on the Web.

### **2.2.2. Associate Vice President, External Affairs**

The Associate Vice-President, External Affairs, is responsible to ensure a digital-first approach to communications at the University.

The Associate VP External is responsible for:

- Providing an annual website plan, and progress report with engagement benchmarks, to the Vice-President, Advancement that will be reported to EMG.
- Supervising the Manager of Digital Experience.

- Ensuring the brand positioning on the university website and the presence of stories, content and social media links that promote the university brand and reputation consistently.
- Determining the treatment of sub-brands on the university website.
- Establishing policy, procedures, operational infrastructure, and quality assurance program.
- Assuring that a common message with respect to the academic plan, the strategic directions, the strategic and integrated marketing communications exercise and other EMG priorities are achieved.
- Implementing priorities strategically established by EMG for renewal and redevelopment of the website.

### **2.2.3. Senior Director, Information Technology Systems and Support**

The **Senior Director, ITSS** is ultimately accountable and responsible for the proper functioning of the SMU web presence.

The Senior Director, ITSS will be accountable and responsible for the proper functioning of the technical infrastructure with strategic and operational goals and objectives, and will provide management advice to senior and executive staff and faculty in the provisioning of Web services and policy.

Further, the Senior Director, ITSS is accountable and responsible for the planning and provisioning of the required infrastructure, software and supports for the ongoing development of the Saint Mary's web presence.

### **2.2.4. Assistant Director - Client Services**

The **Assistant Director – Client Services** reports to the Senior Director, ITSS and oversees Web infrastructure operations and resources (human, financial and technical.)

More specifically the Assistant Director – Client Services will:

- Provide recommendations and advice to the Executive Sponsor and senior administrative and academic administrators in the progress of Web infrastructure improvements and growth.
- Ensure that a common set of tools are available for the Web Editors and Writers. At a minimum, there will be a Content Management System.
- Acquire external technical specialists as required to perform special functions where the expertise is not available in-house and manage defined contracts for those external specialists when necessary.

### 2.2.5. Manager, Information Systems and Services

The Manager, Information Systems and Services reports to the Assistant Director - Client Services, and ensures and manages a stable production environment in terms of maintenance and change management.

More specifically Manager, Information Systems and Services will:

- Perform regular periodic system audits and presents findings to the Senior Director, ITSS.
- Interface, as necessary, with external contractors for web initiatives.
- Support the work of the Manager of Digital Experience in the development of the overall website.
- Plan and organize technical resources as required.
- Regularly consulting with the Manager, Digital Experience External Affairs regarding the operations of the main website and related technical issues.
- Maintain records on the deployment and licensing of the Content Management System.

### 2.2.6. Manager of Digital Experience

The **Manager of Digital Experience** leads content strategy, user experience and design efforts for the main Saint Mary's website and other digital communication tools on behalf of the AVP, External Affairs.

Responsibilities include:

- The alignment of the website to various digital communications campaigns.
- Regularly consulting with the Manager, Information Systems and Services, ITSS regarding the operations of the main website and related technical issues.
- Consulting with content owners across campus to ensure digital content is in accordance with the University's content strategy and standards;
- Participating in the SMU Communications Group Committee;
- Ensuring the ongoing high quality and improvement of the user experience across Saint Mary's digital platforms;
- Directing a Web Team approach at External Affairs that includes:
  - Overseeing the work of two Web Developers as part of the Web Team at External Affairs (see below)

- Supporting other key positions in External Affairs, notably the Communications Officers, the Digital Media Coordinator and the Social Media Coordinator
- Coordinating digital messages across multiple platforms (incl. social media, campus monitors, email);
- Reporting on the work of the Web team to the AVP, External Affairs.

### **2.2.7. Web Developers**

The Web Developers will report to the Manager of Digital Experience within the External Affairs Department. Web Developers will create the web pages and develop the website navigation following the web guidelines and policy. They will consult, train and/or assist to Editor and Content Owners in the provisioning of websites.

More specifically the Web Developers will:

- Use and support the University's content management system and software, middleware, or systems utilizing new technology and demonstrating and delivering services through a web presence.
- Be responsible for design and production of graphics/images, and web pages that are compatible with University's Brand Standards.
- Be proficient in utilization of the standard graphics applications, and possess skills in producing images, web pages, web programming languages, animation, and photo manipulation.
- Interface with customers via phone, email, in person or Web-based tools; process customer requests, provide estimates of effort and cost (external) conversion.
- Train Web Editors and Writers in using the content management system.

### **2.2.8. Communications Officers**

Faculty Communications Officers, and similar staff in other Administrative departments, will contribute to the overall web presence of the University by overseeing their faculty or departmental web content.

More specifically the Communications Officers will:

- Ensure the accuracy and high quality of their faculty and departmental content
- Contribute news and events to the main Saint Mary's news site and calendar

- Help communicate to faculty and staff the importance of quality web content to the reputation of the university
- Participate, when required, on web content projects related to their areas, or to the overall University web presence.

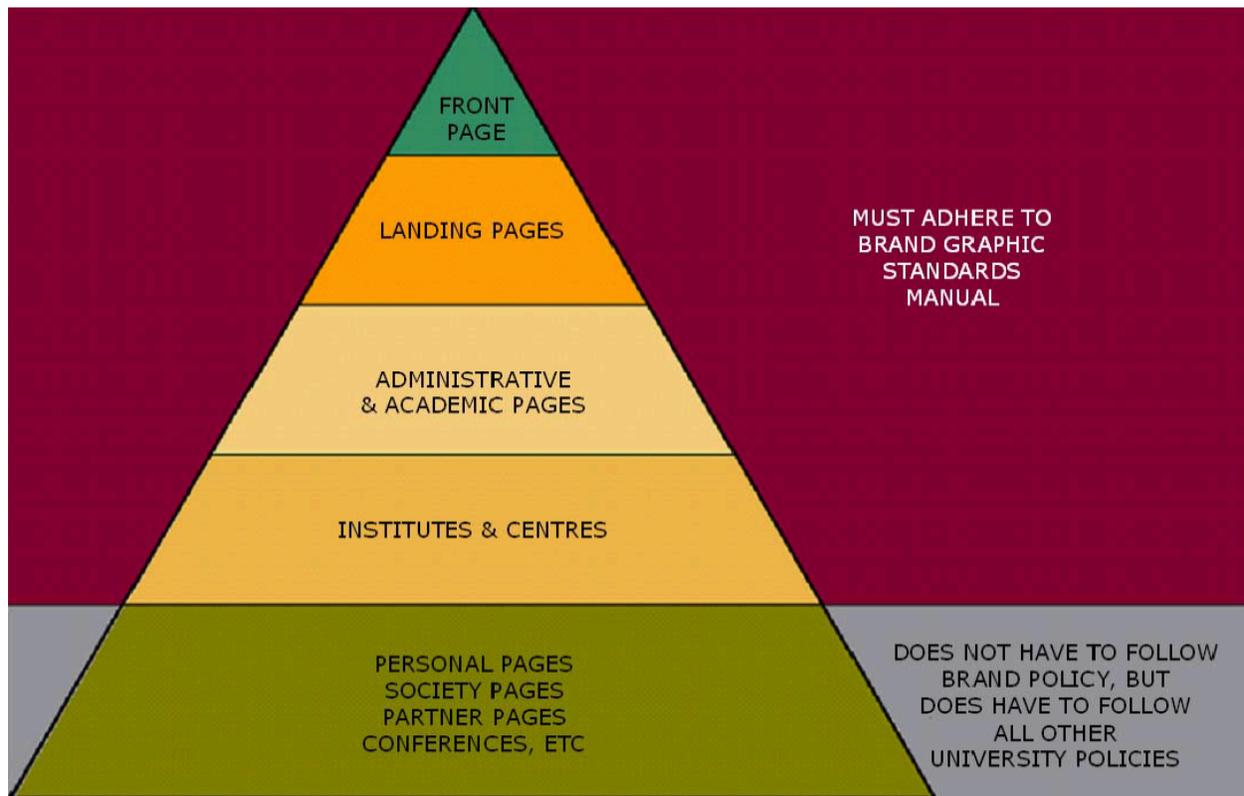
### 3.0 Web Design Policies

#### 3.1. Main Website

The Saint Mary's University website is organized into 4 primary structural elements:

1. Front Page
2. Landing Pages
3. Administrative and Academic Pages
4. Institutes, centres, and microsites

The following is a graphical representation of these structural elements and which policies apply to them:



### **3.2. Supplemental Pages**

In addition to the core website, the University web presence includes Society Pages, Personal Pages, Partner Pages, Conferences, etc. These pages are outside the branded website and do not have to conform to the University brand.

### **3.3. Microsites**

Faculties and Administrative Departments may, in special circumstances and with the approval of the Manager of Digital Experience, develop a microsite. Microsites are not defined by size, number of pages, or a particular technology, but by meeting some of the following characteristics:

- Are for specific purposes, such as promoting an event or campaign.
- Have a certain life expectancy with a stated start and ending timeframe.
- Are in keeping with the University's strategic directions.
- Are a design concept rather than a technology.
- Should follow the University brand standards

As with all sites, the Content Owners for the particular area must have prior approval for the use of the microsite. To develop the microsite, the Content Owner is responsible to:

- Obtain approval of the Manager of Digital Experience (who, in some circumstances, may refer the issue to the AVP External Affairs, the VP Advancement, and/or Web Advisory Committee).
- Work with the Manager of Digital Experience and the Web Team to define the requirements and ensure integration with the University website analytics and other University systems.
- Register domain names through ITSS.
- Ensure the microsite conforms to this Policy.
- Ensure brand standards are appropriately followed, and there are links to the main University website.
- Ensure continued support is available, and that more than one person has administrative rights for the site.
- Provide Administrative access (credentials) to the Manger of Digital Experience

## **4.0 Content Management System**

Saint Mary's will operate one primary Content Management System (CMS), which will be maintained by ITSS. All Editors and Web Writers will use this content management system to write and edit their Faculty or Administrative Department Web pages. ITSS department will supply CMS licenses as required.

The Web Team will setup all pages with the appropriate template, which will follow the Saint Mary's University Brand Guidelines document. Training and support for the CMS will be provided to all Editors and Writers through the Web Team in the External Affairs Department.

#### **4.1. Training for Web Editors and Writers**

Training will be provided to the Web Editors and Writers in two topics:

- Content Management System.
- How to write content for the web.

#### **4.2. Training on CMS**

The Software and Application Support (SAS) Centre will provide training on the use of the Content Management System. This will include how to enter content, review it in the development environment and how to publish the content to the production website. Supplemental or “as needed” training will be provided primarily in-house by one or more of the Web Team in External Affairs, and the Software & Application Support Centre.

#### **4.3. Training on How to Write Content for the Web**

External Affairs will provide training to the Web Editors and Writers on how content is written for the web and the key messages or themes that are to be used to be consistent with the university branding. This training will be provided primarily in-house by External Affairs or a third party as needed.

#### **4.4. Alternate Technologies**

Situations may arise where the CMS cannot satisfy the requirement. In such cases, alternate technologies may be approved to supplement the current CMS providing:

- Request is based on functional requirements and is consistent with the needs of the University.
- The functionality of the existing CMS is fully reviewed to determine requirements match with current CMS.
- After the review, if alternate technology is needed, previously selected alternatives will be considered to minimize the number of technologies used.
- The Manager of Digital Experience, in consultation with the Manager, Information Systems and Services or other representative of ITSS, must approve use of alternate technologies.
- Processes are put in place to ensure the long-term support of the technology.