Designing Your Next Generation Foundation Website

BY MARTIN B. SCHNEIDERMAN

Although grantmakers first began publishing information about their foundations on the Web in 1995, it wasn't until 1998 that those pioneers were joined by a significant number of others. It's interesting to go back in time using the Internet Archive Wayback Machine at www.archive.org to see archived copies of our websites since 1996.

Most of the first generation "brochureware" sites had a very basic design, limited content and no interactive capabilities. In the early days there was widespread concern that a web presence would surely create a flood of unsolicited grant applications. We learned that it didn't.

Today, websites have become the primary means for most grantmakers to disseminate information to the general public, grantseekers and targeted audiences. One of the greatest benefits is the significant reduction in staff time and cost to publish and disseminate commonly requested foundation publications. Well-informed grantseekers also submit better proposals.

Websites can serve as the hub for all foundation communications and link to in-house information systems. But very few foundations have yet realized this potential.

In spring 2003, the Technology Affinity Group (TAG), at www.tagtech.org, and the Council on Foundations conducted a comprehensive Grantmakers Information Technology Survey (go to www.cof.org and key in Tech Survey Summary as the COF code) .

The study reported that most foundations still have websites with no ability to accept online applications or grantee reports or to search a grants database. Fifty-four percent of the respondents rely on an outside vendor for all website maintenance and 23 percent report that an internal staff member with HTML expertise keeps their content up-to-date.

The following five web-related technology issues were identified as being among the most difficult to address:

- Expansion and maintenance of websites
- Online grantmaking and online donor information
- Costs of keeping up with new technology
- Integration of database software with other applications
- Security.

Challenges and Common Pitfalls

Grantmakers report that the development and timely updating of their websites has been much more difficult, time consuming and expensive than they anticipated. Here are some of the reasons:

Inexperienced vendors. To develop their websites, foundations typically have turned to advertising and communications firms that have been doing the foundations' annual reports. All too often those outside organizations aren't familiar with foundation operations or don't have the experience and technical expertise to develop high-quality websites that are easy to maintain.

Underestimating involvement. Launching a new site requires much more time than most people realize. You'll need to answer many questions, provide final copy, select graphics and make informed decisions—all in a timely manner.

Cost overruns. I've often heard, "The total cost of our website ended up being two or three times more than the vendor's original estimate." Cost overruns are common when requirements keep changing, when there's no written scope of work and when work is done on a time-and-materials basis.

Weighing costs and benefits. The cost of a well-designed website should be weighed against its ability to improve communications, reduce print publication and distribution costs and streamline operations. Focus on the long-term total cost of ownership.

Hard and expensive to maintain. Poorly designed websites can be difficult to maintain, which is the major reason more than half of all foundations pay a developer a fee every time they need to update content. Another common complain I've heard: "Updates take a long time, are costly and hard to budget for, and we're at their mercy."

Information isn't up-to-date. Program officers sometimes tell grantees, "I'll mail you a copy of our latest guidelines—the information on our website needs to be updated." This can occur when staff is more comfortable publishing printed materials and the site is a second priority.

Integration with other systems. It's been hard to integrate websites with foundation information systems and Microsoft Office applications. But the leading providers of grants management software are exploring vendor partnerships, developing Application Programming Interfaces (API), and considering new technologies such as Web Services that should make integration easier in the future. (For more, see "Trends in Grants Management Software and Services," May/June 2003 *Foundation News & Commentary*, online at www.foundationnews.org/CME/article.cfm?ID=2495 .)

Inadequate staff training and backup. Most foundation webmasters have little or no formal web training. There's often just a copy of *HTML for Dummies* on a nearby shelf. Be sure that your webmaster and the backup get the right training so you can maintain the site when there's staff turnover.

Poor content editing tools. Many developers recommend tools that aren't well suited for nontechnical staff to use for updating content. Make sure your staff has one of the excellent and easy to use website editing packages that are now available.

Broken links. More than 70 percent of foundation sites that I've reviewed have a significant number of broken web links that display a "This page cannot be found" error, which usually occurs when either an internal or external webpage or document has been moved or deleted. Many self-taught site administrators aren't aware of "link rot" and don't regularly test and fix this problem.

The Best Foundation Websites

It has been a past practice in the foundation community for websites to be evaluated by communications staff using standards developed for printed annual reports. But the Web is a different medium and requires a different set of standards. Here are features, capabilities and practices to strive for:

Intuitive site design and navigation. This enables all audiences to find quickly the information they're seeking.

Content that your audience is really looking for. The primary users of foundation websites are almost always grantseekers. Be sure that the content you're providing is what *they're* looking

The Rasmuson Foundation's Experience

The experience of Jeff Clarke, chief administrative officer for the Rasmuson Foundation in Anchorage, Alaska, is typical.

"When we updated our first generation website, it was a challenging experience. We contracted with an advertising agency to develop the new site at a cost of about $10,000. At the time, our staff didn't have experience either in defining business requirements or managing vendors in this type of process. Website development wasn't our ad agency's area of expertise and they didn't design the site so that our staff could keep our content up-to-date. We became dependent on them for all content changes at an ongoing cost of $100/hour. This proved to be very expensive.

"We recently completed a thorough review and redesign of our site, www.rasmuson.org. We've updated and added content and restructured the navigation to make it easier for visitors to find just what they're looking for.

"The key factors in the success of this four-month project were the combination of staff expertise in business process, requirements definition and vendor management together with the help of experienced website consultants. We conducted an online survey to solicit comments and suggestions, analyzed the site usage log files, benchmarked with peer grantmaking organizations and well-designed for-profit sites, and developed a prioritized action plan.

"This first phase of our site redesign cost $13,000 in consulting fees. The next phase will be to migrate to a Content Management System and to conduct a foundation-wide communications review."

—*M.B.S.*

for—not just what you'd like them to read. Make it easy to find application guidelines and deadlines, a clear description of what you do and don't fund, and a usable application form.

Usable application forms. A downloadable grant application form in PDF format is easy for the grantmaker to distribute, but a pain for the applicant to use. Grantseekers report that after typing responses to each question, they have to cut and paste (the old fashioned way, using scissors and rubber cement) answers onto a copy of the form and then photocopy and mail (via USPS) all of the pages of the application.

Ensure accessibility. Accessible web design increases online communication's effectiveness, usefulness and reach for everyone. All U.S. government websites must now adhere to www.section508.gov accessibility standards. Let's ensure that our foundation and grantee sites are also accessible to our growing population of visually impaired people who use wonderfully enabling screen reading browser software (with built-in speech synthesizers) and to the 11 million Americans who are color-blind.

Provide key content in the languages spoken by your target audiences. Very few sites have been designed to be fully bilingual. A more practical and cost-effective approach might be to publish copies of the most frequently accessed pages and selected reports in other languages. See www.wkkf.org and http://foundation.verizon.com for examples.

Choose your words carefully. On a webpage, less is more. Usability studies show that most people read and retain only about 25 percent as much text on a monitor as they can on a printed page, so keep pages short.

Use systems that make it easy to maintain content. To maintain site content, there's no longer a need for your staff to know HTML. Products such as Macromedia's Contribute software and Content Management Systems (CMS) offered by service providers make it easy for nontechnical staff to implement updates using What You See Is What You Get (WYSIWYG) editors.

Use templates and style sheets. Templates and style sheets are currently accepted as good web design practices and can provide an attractive and consistent presentation, also making the site easier to maintain.

"I've found that when grant application forms are on the Web, they're usually in Adobe Acrobat Reader format, which doesn't give us the ability to fill them out on screen.

"The toughest part of my job, these days, seems to be finding a typewriter and someone to fill out paper forms."

—Community college grantwriter

Keep graphics small. Use graphics software to reduce the size of graphics (not the width and height attributes of the HTML tag) so they load more quickly—even on a computer with slow dial-up access.

Index all content to make it searchable. Be sure that larger sites have a search engine that regularly indexes and displays the complete contents of all webpages, attached documents (in PDF, Word and Excel formats), and the contents of grant database listings.

Dynamic site map. This should be updated (preferably automatically) whenever a new section is added or deleted.

Grant listings. Export selected grant data from your grants management system and post it on your website in a searchable format. Permit users to filter and sort results by such criteria as program area and grant year.

Post frequently asked questions. FAQs are a big help to grantseekers. Ask your colleagues and selected grantees to develop a comprehensive list and then be sure to review and update it periodically.

Online grant eligibility quizzes. It's a waste of everybody's time if you receive proposals that are ineligible for funding. Put an online grant eligibility quiz on your site. Be sure that the quiz has branching capabilities to explain why a grantseeker's proposal is ineligible and also includes links to appropriate sources for further assistance.

Online grant applications. Work

# Our online tools help foundations manage one of their most valuable assets.

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Our clients are among the most effective philanthropic organizations in the world. They invest millions in programs to improve people's lives, protect the environment, and build healthy communities.

Money funds their initiatives, but knowledge shapes their success. That's why our online tools and consulting services are designed to help grantmakers effectively manage and share their knowledge.

From award-winning public Web sites to private intranets and extranets, our solutions can help your foundation capitalize on its information assets.

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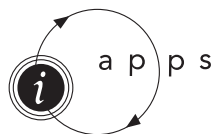
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Strategic Internet Solutions for Foundations and Nonprofits

with your grants management software provider to create a web-based grant application on your site that is integrated with your eligibility quiz and your grants management database. This can really streamline your operations.

Online grantee report submission. Use your website to provide instructions and downloadable report templates in Word or RTF format for grantees to use. Then create a web form for grantees to upload and submit their reports. The best grants management software facilitates the import of those files into your core system.

Links to useful resources. Provide categorized links to online resources that grantseekers and the public will find especially useful.

Mailing list sign-up. Invite your constituents to use your website to opt in or out of mailing lists based on their expressed interests. See www.williampenn foundation.org for an example.

Display maps and directions. Provide a map with directions to your offices via public transit and by car. Consider providing links to Yahoo! Maps or MapQuest.

Evaluate and improve your site. Use surveys and web forms to ask site visitors what they like and don't like about your site. Ensure that feedback is sent to a staff member who regularly reviews it, analyzes results and responds in a timely and appropriate fashion. Consider this input when making content updates and site redesigns.

Analyze your site's usage. Most website hosting companies provide detailed reports of site usage. Use them to plan your site navigation and future redesigns. Those reports can tell you:

■ How often the site is visited

■ Which pages on your site are most popular

■ What referring site the visitor came from

■ What external search engine term was used to find your site

■ Which browser types and versions are being used.

Ensure readability in common screen resolutions. Although many different size monitors and screen resolutions are in use, 800x600 is considered the lowest common denominator for resolution. Make sure your site works well in this and other resolutions. Use BrowserSizer (see "Some Useful Tools and Services," page 41) to test this.

Design and test for popular browsers and computers. Ensure that the site design looks just right with all commonly used versions of the Internet Explorer and Netscape browsers running on both Windows and Macintosh computers. Some designs don't.

Limit use of add-in products. Employ multimedia products such as Flash only when you're sure that almost all of your target audiences will be able to use them.

Check and fix broken web links. Low-cost tools are available that can easily check all of the links on your site in just a few minutes. At least once a month, use Link Sleuth™ (see p. 41) to check your website for broken links.

Ensure accurate descriptions by external search engines. Use HTML description metatags (your site designer will understand) so that popular search engines describe your foundation accurately, not like the useless real-world Google listing shown below. In this example I've changed the foundation's name to protect the innocent.

THE ABCDE FOUN-DATION. This site utilizes frames. If you can read this text, then your web browser does not support frames. We suggest Netscape Communicator or Internet Explorer. ...
www.abcdefdn.org/ - 2k - Cached - Similar pages.

Internal intranet. Create an internal website called an intranet to make it easy for your staff to access general administrative information, online forms, useful online resources, and to manage collaborate work processes and share information with committees and board members.

Some organizations need a whole new site designed from scratch and others need only a "facelift."

Some Advanced Capabilities

Larger grantmaking organizations and those with more complex needs, such as community foundations, may require some of the following more advanced website capabilities:

Broadcast newsletters. These are efficient ways to communicate with target audiences in graphical or text formats with links to your existing website content.

Private extranet. You can publish a set of private password protected webpages with selected information and discussion forums for donors, invited grantees and other selected groups.

Secure online access to donor investment information. Many community foundations offer this via a seamless web link to NPO Solutions' Donor Central Web portal www.npo solutions.com/main/docsDonor Central.pdf.

Syndicated content. The Community Foundation of America's VisionManager service (www.visionmgr.org) offers access to frequently updated philanthropic information and articles. GiftLaw (www.giftlaw.com) offers content services for philanthropic advisors.

Secure e-commerce. This permits credit card transactions for donations.

Multi-user authoring. This allows multiple individuals to create and edit web content at the same time.

Workflow approval process. You can create an online process to review, edit, approve and publish content. Appropri-

> Be sure the content you're providing
> users is what *they're* looking for—
> not just what you'd like them to read.

ate responsibilities are assigned to different staff.

Online calendar. This can be used to display foundation events and proposal deadlines.

Types of Sites

There are two fundamentally different types of websites to consider:

Static sites. Static websites are written in HTML (the language of the Web) and consist of a set of individual linked pages. A master set of your site's files resides on a local computer. Once edits are made using web editing software, updates are uploaded to the public site, which is usually hosted externally. The majority of existing foundation websites are designed this way.

Content Management System (CMS). This is a newer approach that is well suited for organizations with larger and more complex sites, content that changes frequently, a need for interactive capabilities and limited in-house web programming skills. CMS sites use templates to specify design and navigation. All text, images and attached files are stored in a database and accessed to create and display all pages. Content updates are easy to make

using web-based screens. CMS includes many powerful built-in features that are either unavailable in a static site or that you'd need to have custom designed. Application Service Providers (ASP) usually offer CMS as a hosted service. An advantage of CMS is that future site redesigns are much easier and less expensive because you can change the template and then use all existing content.

Selecting Vendors

You'll probably need different services from one or more consulting firms. Be sure to work with experts who really understand foundation operations and can help you make informed decisions.

Begin by conducting a communications audit and needs analysis to develop detailed written requirements and specifications for the new system. Then develop a request for proposals, identify qualified vendors to submit proposals, evaluate the proposals, select a vendor and contract for services. Don't short-cut those steps before starting the site development.

Here are some key questions to ask and things to look for when selecting consultants and website design firms:

■ What are the qualifications of their key consulting and technical staff?

■ Have they worked successfully with organizations similar to yours?

■ Is website consulting, design and hosting the company's primary business?

■ Is the company profitable? Are they growing?

■ Evaluate similar websites they've recently created.

■ See a demonstration of the software and process used to maintain the site content.

■ Were projects completed on time and on budget? Is support good?

■ Who hosts the site and where? What systems are used? Are there performance and up-time guarantees?

■ Make sure the system isn't proprietary so that you're not locked into the vendor.

■ Are the terms of the service level agreement favorable?

Range of Costs

The cost of designing and hosting websites varies widely. Some organizations need a new site designed from scratch and others need only a facelift.

Factors that will affect the cost of site design and hosting include:

■ Breadth of the site's design or redesign

■ Quantity and complexity of content

■ Quality of an existing site design

■ Choice of a static site or a Content Management System

■ Graphic design

■ Source and cost of artwork, photos and multimedia

■ Search engine capabilities

■ Security requirements

■ Integration with external systems

■ E-commerce services

■ Usage reporting

■ Hosting services

■ Server and data communications performance and redundancy

■ Site conversion

■ User training and support.

To host their websites, most foundations opt to use external providers, which are much less expensive, offer faster access speed (most DSL lines aren't adequate) and provide better security.

The least expensive option for a foundation with very basic needs is the Foundation Center's free Foundation Folder (http://fdncenter.org/grantmaker/folders.html) offering and their Premium Web Hosting Service for $1,000 per year.

Custom static websites can range from about $5,000 to $25,000 plus the annual cost of hosting, which can range from $600 to $1,500.

The costs of Content Management System services offer an especially wide range, depending on the level of customization and what capabilities are required. Initial implementation can range from about $5,000 to $150,000 or more. Annual support, which usually includes hosting, can range from $4,000 to $20,000 or more. **FN&C**

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Some Useful Tools and Services

■ **AlertSite**—www.alertsite.com. An online website monitoring and alerting service (starting at $15/month) that checks your website regularly to ensure it's available and operating properly.

■ **BrowserSizer**—www.applythis.com/browsersizer. A free program to see how a site will look using Internet Explorer and Netscape in different video resolutions. This small application resizes your browser and displays how text wraps and images look. It's a must-have tool for testing all webpages before they go live.

■ **Cynthia Says™**—www.contentquality.com. A free online tool that permits you to review your websites to evaluate accessibility for handicapped users as established by the U.S. Government's Section 508 Standards.

■ **Google back link search.** Did you ever wonder which organizations have websites with links to yours? Google, and most other search engines, provide a quick and easy way to find this out. Go to Google, type in "link," a colon, and then your foundation's website. Check the search engine's advanced functions for specifics.

■ **pdfFactory**—www.fineprint.com. A $50 program that creates small Portable Document Format (PDF) files. This is the industry standard format for downloadable files.

■ **Xenu**—http://home.snafu.de/tilman/xenulink.html#Download. Xenu's free Link Sleuth™ program checks websites for broken links, creates detailed reports, and provides an optional site map. It is also able to re-check broken links, which is useful for temporary network errors.

■ **Stock image Galleries.** The following are sources of stock images that are available at reasonable cost. The lowest available image resolution is acceptable for web publishing.

■ http://dgl.microsoft.com   ■ www.comstock.com   ■ www.photosphere.com

—M.B.S.