Our Process & Lessons Learned From Launching a Website Redesign Project

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JourneyNorth

Step 1: Problem Recognition

Journey North staff identified data errors and inconsistencies and heard from volunteer observers who expressed confusion over protocols and had difficulties finding materials on the Journey North website.

With over 100,000 registered volunteers, staff realized the website was not meeting volunteer and user needs nor supporting the core value of building an open and inclusive participatory science program.

Begun in 1993, a non-profit newly aquired by UW-Madison Arboretum in 2018

Step 2: Assessments

Actions Taken:

- Conducted Website Audit using Google Analytics; Generated website inventory
- Worked with UW-Madison iSchool graduate student to conducted User Website Experience Study (included qualtrics survey (n= 35,647 users) to identify demographics, level of engagement, & users' website perceptions, and 90-minute semi-structured interviews focused on task completion
- Using H.E.A.R.T. framework (Happiness, Engagement, Adoption, Retention, Task success), identified website re-design goals
- Inventoried education materials on website
- Conducted ADA compliance audit of website

Gather information to make decisions & set priorities

Step 2: Assessments -- Findings

Challenges identified:
- Navigation neither straightforward nor memorable
- Use of double menus confusing
- Two websites added confusion (Drupal site & legacy HTML site)
- Not mobile friendly
- Not sufficiently accessible
- Content bloat - 60,000+ pages
- Outdated logos & styling
- Unclear content with multiple versions & conflicting instructions
- No presentation of mission, vision, or history
- No data privacy or terms of use policies
- No metadata documentation

Step 3: Agile Planning

Actions Taken:
- Contracted UW-Madison software developer
- Prioritized website pages to be redesigned
- Developed mobile friendly strategy (using Vue.js) for data entry and registration
- Set up task tracking to document goals, objectives, timelines using Atlassian-Trello and Excel
- Reported frequently to celebrate accomplishments

Challenges:
- Halfway into the process, parallel work needed to restructure two databases
- Project plans and budgets needed to be renegotiated

Plan for the unexpectected

Step 4: Website Re-Design

Actions Taken:
- Collected features and styles from other websites as inspiration for redesign
- Created mock-ups and wireframes using Adobe XD
- Tracked detailed design decisions whenever possible (this phase takes time and measurement of progress can be difficult)
- Learned to let go (motto: Do not be afraid to jettison materials -- less is often better)

Strive to be inspirational yet keep in mind your volunteers & budget

Step 5: Database Re-Structure

Actions Taken:
- Wrote grant to support two data management fellows to assess extent of data inconsistencies and to assist with development of data cleaning procedures (inconsistencies included, among others, missing values, lack of standardization, incorrect geospatial information, null values)
- Published all Journey North data packages meeting F.A.I.R. data principles
- Restructured data fields to create a relational database

Pivot when necessary

Step 6: Development

Translate ideas into a functional website

Actions Taken:

- Developed navigation hierarchy - using a card sort exercise
- Set up test website/database/data entry app to translate design into actual website templates and database structure (these test sites become virtual "sandboxes")

Challenges:

- Some design items would have required special coding. Staff decided to use Drupal website modules whenever possibe to cut costs
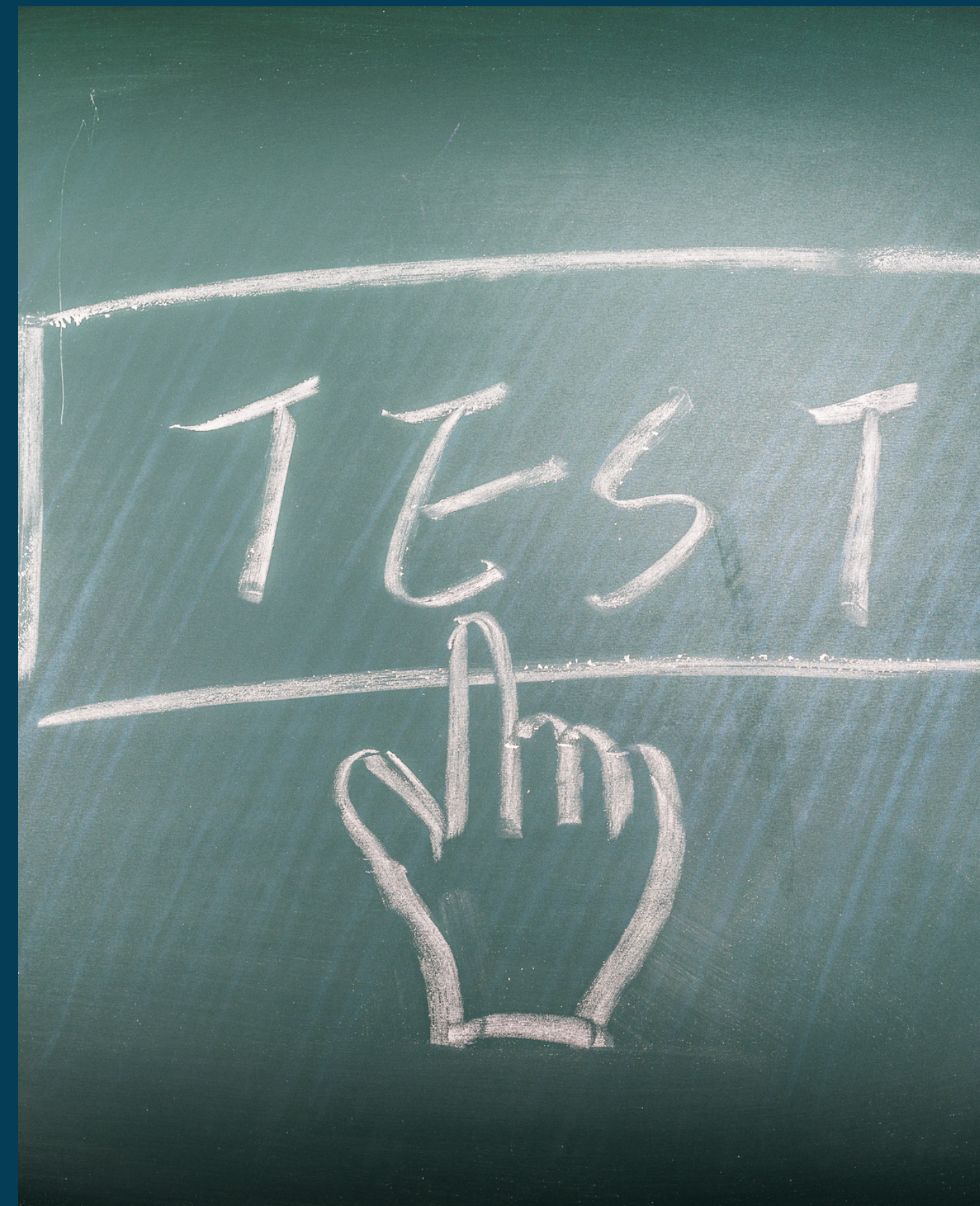
Step 7: Test

Actions Taken:
- Conducted beta test, internally, with Journey North staff
- Investigated options to archive a searchable version of the Journey North legacy website on the WayBack Machine
- Made plans to conduct second phase of beta test, externally, with selected number of Journey North volunteers

Step 8: Launch

Story to be continued...

Recommendations

- Plan for a multi-year process (Our project began in 2020 with end date 2023)
- Plan for a "robust" budget (Our estimated costs: $55,000)
- Dedicate sufficient staff to the effort
- Form advisory committee, include leadership
- Leverage online resources
- Use project management tools like Trello
- Establish evaluation system to measure impacts
- Define goals from the website users' perspective
- Take a system perspective-Map connections among websites, email marketing platforms, databases, servers
- Expect the unexpected!