



Agenda Item 8a

February 19, 2014

ITEM NAME: Website Usability Initiative Update

PROGRAM: Enterprise

ITEM TYPE: Information

EXECUTIVE SUMMARY

The Customer Services and Support (CSS) Service Delivery Transformation Roadmap includes an initiative to improve the usability of the CalPERS On-Line website. The Website Usability Improvement Initiative is intended to examine the usability of CalPERS existing public facing website (www.calpers.ca.gov). Using various research techniques and a user-centered design process, we are creating a new site that will provide easy and intuitive access to the most-needed information, improved search capabilities and new content and tools to help customers in their decision-making processes.

STRATEGIC PLAN

This information item supports Strategic Plan Goal B – Cultivate a high-performing, risk-intelligent and innovative organization. Improvements in the usability and customer satisfaction of our website will strengthen CalPERS position as a leader in delivery of superior customer service.

BACKGROUND

In August 2013, staff provided an overview of the approach for the redesign of the CalPERS website to the Finance and Administration Committee. To improve usability, we are looking at multiple dimensions of site usage, ranging from website traffic and search terms, and more qualitative inputs through stakeholder interviews, member focus groups, and usability testing. Ongoing analysis of this information informs our team to develop a more intuitive site structure, a modernized and more robust search engine and a new visual design which aligns with CalPERS brand standards.

ANALYSIS

Project staff is currently focused on designing and delivering a pilot of the member portion of the website by June 30, 2014. This initial pilot will only be available internally, and will be used to surface any issues users may encounter, validate that users have a positive experience, and prepare the CalPERS organization for a successful website launch. After the launch of the pilot, staff will focus on testing the site with users while continuing to design and test other portions of the site, including the business partners and investments areas. We will use the same user-centered

design approach with the user groups for the remaining content. The public launch of the website is planned for June 2015.

Since August staff performed a wide variety of activities as part of our user-centered design approach. After each of these activities, key findings were developed which helped drive subsequent design revisions.

- Conducted 11 interviews with internal stakeholders in August and September 2013, including Board members, executives, division chiefs, call center staff and member education staff.
- Conducted usability testing at the Sacramento Retirement Planning Fair with 33 members to identify usability issues with the current website, discover top tasks users seek to accomplish on the site, understand pain points and satisfaction, and observe navigation paths.
- Held 4 focus groups with 18 active and retired members to discuss the current website's usefulness, satisfaction, and pain points.
- Performed a review of Web analytics to identify traffic patterns, top tasks, top pages, and sources of traffic (mobile, tablet, computer).
- Conducted a usability review to evaluate the current website design and content against usability best practices and principles, including information architecture, interaction design, visual design, information design, and accessibility.
- Conducted one-on-one usability testing with 10 members at the Educational Forum who were asked to perform common tasks using a prototype version of the new website. At the same event, 45 members completed a card sorting activity to help us identify pain points in the navigation labels, and 45 provided their responses to a survey about their satisfaction and experience using the CalPERS website.
- Conducted usability testing with 246 members (active and retired) in December 2013 to get feedback on the layout and features of the website prototype to validate whether the labeling is intuitive.

In the next quarter, staff will conduct additional usability testing, refine the information architecture, and develop the new visual design. The initial member pilot is intended to demonstrate improvements in the design, access to frequently used functions and information, and a design focused on rich media content with improved visual appeal. It will also demonstrate how the site will conform responsively to mobile devices. It is not expected that every member feature,

service, or piece of content will be available on the pilot. Only pages that have been prioritized as being popular or essential will be included in the initial pilot phase. The project is on track for a delivery of the member pilot by June 2014.

In the second year of the project, staff will be focused on monitoring the effectiveness of the member site while continuing to build out the other site content using the same methodology, including stakeholder feedback. The new full site launch is planned for June 2015.

BUDGET AND FISCAL IMPACTS

Usability testing is currently budgeted at \$200,000 for the current fiscal year. Staff will perform work related to content, infrastructure and design as part of ongoing maintenance and operations. The projected budget for fiscal year 2014-15 is \$400,000 for staff augmentation in the user experience and website development areas.

Potential risks associated with this project include resource constraints from other competing business plan objectives and dependency on funding for next fiscal year's staff augmentation needs.

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