Finance & Administration Committee

California Public Employees' Retirement System

Agenda Item 8a

February 18, 2015

ITEM NAME: Website Usability Initiative Update

PROGRAM: Enterprise

ITEM TYPE: Information

EXECUTIVE SUMMARY

The Website Usability Improvement Initiative is intended to examine the usability of the CalPERS 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 information, improved search capabilities, and new content and tools to help customers make decisions.

STRATEGIC PLAN

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

BACKGROUND

In September 2014, staff provided the Finance & Administration Committee with an update on the progress of the Website Usability Improvement Initiative, including a demonstration of the new features of the website.

On December 31, 2014, staff completed the Employer and About sections of the website. This also included the Career Opportunities section for our audience seeking employment with CalPERS, and the Business Opportunities section for our audience seeking to engage with CalPERS to provide contract and/or consulting services.

The project team began the third and final phase of this project, focusing on the Investments section of the site, which is expected to be completed in March 2015. Plans to test and refine the visual design are underway, with the final visual design being delivered in April 2015. The team is also refining the information architecture and content to prepare for usability testing in spring 2015. The entire site will launch to the public at the end of June 2015.

The goals of the pilot site are to provide:
- Simplified navigation and access to important information
- Improved search capability
- An updated visual design in alignment with CalPERS brand standards
- Improved access and user experience for mobile devices and tablets

ANALYSIS

The project team is now engaged in discovery and design for the Investments section. Similar to the activities during the Member and Employer phases of this project, the team is conducting stakeholder interviews with key members of CalPERS' Investment group as well as external users of the website. In addition to analysis of site traffic, search, and other user behavior patterns, the feedback from these interviews is informing the organization and navigation design for the Investment area. The same methodology will be applied to ensure that consumers of Investments-related content can understand and navigate through the site quickly to get the information they need most. This phase also includes designing, building, testing, and performing quality assurance reviews on various custom applications, such as the Forms & Publications Center, Circular Letter search, Bid Opportunities, and the Newsroom.

Since September, staff performed a wide variety of activities as part of the user-centered design approach:

- Conducted one-on-one usability testing with employers at the Educational Forum who were asked to perform common tasks using a prototype version of the new website. At the same event, employers completed an online activity to help the team identify pain points in the navigation labels.
- Developed content for the Employer and About sections and posted it to the pilot site.
- Designed several custom applications that will be included in the website.
- Conducted stakeholder interviews with key member of the Investments staff as well as external customers.
- Conducted analysis of site traffic, search, and other behavior patterns to shape the organization and navigation of the new Investments section.

The annual Educational Forum provided an excellent opportunity for the project team to engage with our employers and other business partners to measure the improvements in navigation, site structure, and overall satisfaction with the new design.

Additional content refinement on the Employer and About content is also underway based on quality assurance reviews, usability testing, and program area feedback. Before the site is launched, the project team will conduct a comprehensive review to ensure accessibility requirements are met, all content is accounted for, and all elements of the site are functioning as designed.

BUDGET AND FISCAL IMPACTS

The budget for Fiscal Year 2014-15 is $500,000 for staff augmentation in the user experience and website development areas.

Potential risks associated with this project include resource constraints due to competing organizational priorities. In addition, additional resource needs are anticipated for the ongoing content creation and management of the website.

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ROBERT UDALL GLAZIER
Deputy Executive Officer
External Affairs Branch