

Requirements and Best Practices Checklist for Government Web Managers

The Web Managers Advisory Council has developed this comprehensive self-assessment “checklist” to help you assess how well your agency meets federal website requirements and best practices. It’s based on the [recommendations of the ICGI](#), current [laws and regulations](#), and best practices on this website. OMB has directed agencies to follow these requirements and best practices in implementing the [OMB Policies for Federal Public Websites](#).

See also the [one-page checklist](#) (less detailed)

To meet the requirements and best practices, agencies should be able to answer “yes” to the questions below. References to specific URLs will be added soon.

Sections:

- A. Getting Started (The Basics)
- B. Managing Content
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- F. Improving Your Site / Making Changes
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- H. Legal Requirements
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A. Getting Started (The Basics)

1. **Domain:** Is your URL a .gov, .fed.us, or .mil domain?
2. **Agency Name:** Does every web page on your site clearly display the name of your agency?
3. **Linking Policy:** Does your web site have a linking policy for how you link to other sites, including criteria or guidelines for how you select links to non-federal websites?
4. **Linking to Non-Federal Sites:** Does your site notify visitors when they are being taken to a non-federal government site?
5. **Disclaimer:** Does your web site disclaim the content and privacy policies when linking to a non-federal site?
6. **Linking to Federal Sites:** Does your site refrain from disclaiming content when linking to other federal sites (to meet the goal of seamless government)?
7. **Reviewing External Links:** Does your site have and follow a schedule for reviewing the appropriateness and relevancy of external links?
8. **Advertising:** Have you consulted with your agency’s legal staff to ensure that your site is not used to advertise for, or provide preferential treatment to, private individuals, firms, or corporations?

B. Managing Content

1. **Keeping Content Current:**
 - o Does each page of your website have a date showing that it is current, that it has been reviewed within the past 12 months, or that it is historical material?
 - o Do you regularly delete or archive content that is obsolete and is not required by law or regulation?

2. **Audience-Driven Content:** Overall, is your site written and organized from the audiences' point of view, with content that they care about most?
3. **Content for the General Public:** If your site is for a specialized audience, do you still offer basic content for a general audience with basic descriptive or identifying language?
4. **Avoiding Internal Employee Information:** Do you refrain from using public website for content of interest or use to agency employees only, using intranets or extranets for this purpose?
5. **Common Terminology:** Does your site use common expressions, generally used terminology, and refrain from using acronyms or technical terms without defining them in context?
6. **Plain Language:** Have you ensured that, at a minimum, homepages, all major entry points, and navigational elements are written in plain language. (Plain language is language the website's typical visitor can understand in one reading; it is writing designed for the reader.)
7. **Editorial Review:** Do you have a process for regularly reviewing your homepage, major entry points, and navigational elements to ensure they continue to be written in plain language, considering your site's intended visitors?
8. **Language Tools:** Do you use language tools, including language software, to evaluate the readability of the website's content?
9. **Testing:** When possible, do you test language with typical visitors?
10. **Metadata:**
 - o **Minimum Metadata Elements:** Do your new sites include the following metatags on the homepage and all second-level pages:
 - Title (this is different from the HTML title tag)
 - Description?
 - Creator (the content owner; this should be the name of the organization)?
 - Creation Date (original creation date)?
 - Last Reviewed Date?
 - Language?
 - o **Subject and Keyword:** Do you include Subject and Keyword metadata if you consider it helpful for improving search relevancy and for content classification within your organization?
 - o **Where You Put Metadata:** In addition to the homepage and second-level pages, do you try to include metadata on as many pages as is feasible, within resource constraints?

C. Required and Recommended Content

1. **Common Content:** Does your site include the same types of "common content" found on most federal websites (such as contact information and basic information about your agency)?
2. **"Contact Us" Page**
 - o Does your site have a "Contact Us" page linked prominently from your home page and every major entry point (ideally from EVERY page)?
 - o Does that contact page contain:
 - your organization's mailing address?

- street addresses for any regional or local customer service offices?
- phone number(s), including numbers for any regional or local offices, including toll-free numbers and TTY numbers?
- means to communicate by e-mail (for example, email address or web-based contact form)?
- your policy and procedures for responding to email inquiries, including whether your agency will answer inquiries and the expected response time?
- contact information to report data problems required by the Information Quality regulations?
- contact information for small businesses, as required by the Small Business Paperwork Relief Act?
- instructions on how to request information through the Freedom of Information Act (FOIA)?
- contact information for reporting both technical and content problems with the website, including accessibility problems?

3. **“About Us” Page**

- Does your site have an “About Us” or similar page describing basic information about the organization that sponsors and is responsible for the site?
- Does the “About Us” page contain:
 - a description of the organization’s mission, including its statutory authority?
Reference: Section 207 (f)(1)(A)(i) of the E-Government Act of 2002)
 - your agency’s strategic plan?
Reference: Section 207 (f)(1)(A)(iv) of the E-Government Act of 2002)
 - information about your organizational structure?
Reference: Section 207 (f)(1)(A)(iii) of the E-Government Act of 2002)
 - basic information about parent and/or subsidiary organizations and regional and field offices, as appropriate?
 - name of the agency head and other key staff, as appropriate?
 - contact information such a link to the “Contact Us” page or other elements listed above?

4. **“Site Map” or “Subject Index”**

- Does your site have a page entitled “Site Map” or a page entitled “Subject Index” that gives an overview of the major content categories on the site?
- Is there a link to the site map or subject index on your home page?
- Do you have and follow a schedule for updating the site map or subject index on a regular basis (for example, at least once a month)?

5. **Frequently Asked Questions**

- Does your site have a page called “Frequently Asked Questions” or “Common Questions?”

- Is that page linked from the homepage and every major entry point, using the title of the page as the link text?
- Does that page provide basic answers to questions the agency receives most often?

6. Online Services, Forms, and Publications

- Does your site offer easy access to online services, displaying them as prominently as possible?
- Do you identify the most commonly requested and commonly used online services on your website and make sure that they are advertised prominently and can be reached quickly?
- As you add new online services to your website, do you highlight them appropriately?
- Does your site offer easy, prominent access to forms and publications?
- If your site offers forms, do you also link to related government-wide portals? Currently, fedforms.gov is the only forms portal.
- If you offer publications, do you link to government-wide portals that offer related publications? Currently, pueblo.gsa.gov and gpoaccess.gov are publications portals.
- If you have forms, do you allow the public to print them out and also complete and submit them online?
- If you don't offer forms or publications in electronic format, do you provide instructions on how to order them?

7. Information about Jobs

- Does your site offer information about jobs or careers at your agency? (even if you are a small agency or your site is managed by multiple agencies, you should provide basic information about how jobs are filled).
- Does your site link to USA Jobs, the official jobs "portal" of the U.S. government?
- Do you include information about working at your organization?
- Do you provide information on special jobs programs like internships and work-study, and other information particular to working for your organization?
- If your website represents a small organization within a larger agency, do you point to the jobs information for your parent organization?

8. Information about Regulations

- If your organization issues regulations do you provide information about those regulations on your website?
- If your organization issues regulations do you link to Regulations.gov?

9. Information about Grants

- If your organization provides grants or has contracting opportunities do you provide information about those opportunities on your website?
- If your organization posts grants information do you also link to grants.gov and any other federal portal(s) related to grants?

- If your organization posts contracts information do you link to fedbizopps.gov and any other federal portal(s) related to contracts?

10. Required and Important Links:

- **Privacy Policy:** Does your website have a link to your privacy policy on every page?
- **FOIA:** Does your site have a link from the homepage to the Freedom of Information Act reading room?
- **Digital Rights, Copyright, etc.** Does your site inform the public about your policies on digital rights, copyrights, trademarks, and patents?
- **No Fear Act Data:** Does your site provide a link to information required by the “No Fear Act?” (the current Interim Rule requires you to have this link on your homepage. But the Web Managers Advisory Council has recommended that agencies determine the most appropriate placement for this link (perhaps the “About Us” and/or “Jobs” page), based on the audience needs of each agency).
- **Paperwork Reduction Act:** If your agency is subject to the Paperwork Reduction Act, do you post your policies to implement the “Information Quality Guidelines” on your “Contact Us” page?
- **Security Protocols:** Does your site provide general information about your security protocols to protect information?
- **Home Page:** Does every page on your site have a text link back to your homepage? (if you use a graphical link, you must also provide a text link).
- **Link to FirstGov:** Do you provide a link from your homepage and major entry points to the homepage of FirstGov.gov, the official web portal of the U.S. government?
- **“Website Policies and Important Links” Page:** Does your website have a page entitled “Website Policies and Important Links” that includes links to all the above required information and important policies?

D. Usability, Accessibility & Design

1. Common Access:

- Has your site been designed, developed, and tested for a broad range of visitors, including those with lower-end hardware and software capabilities?
- Has your site been designed, developed, and tested for multiple browsers and versions of browsers, operating systems, connection speeds, and screen resolutions, based on an analysis of your site visitors?
- Do you review visitors’ technological needs at least semi-annually (via web analyzer tools or other analytic data)?

2. **Page Download Times:** Do you accommodate visitors with low connection speeds by to the maximum extent feasible, minimizing page download times for your visitors and in most cases, keeping your HTML pages under 50 KB?

3. **Advanced Technology (including Flash):** Do you avoid the most advanced web design technologies (such as Flash) if your target audience generally does not have access to those technologies?

4. **Accessibility Policy:** Does your site provide a page that explains your organization’s policies for accessibility and how people can get assistance?

5. **Consistent Navigation Scheme:** Does your site have a coherent navigation scheme, which is used consistently across the website?
6. **Consistent Navigation Labels:**
- Do common items that exist on different sections of the site appear, if possible, in the same location on each page and have the same appearance and wording?
 - If a navigation item is shared by a group of pages (such as a set of pages on a single topic, or for a division of the organization) does it have the same location, appearance, and wording on each page?
 - Do navigation items of the same type also look and behave the same way? (For example, if a set of pages on one topic has subtopic links in the left navigation bar, pages on other topics should also have subtopic links in the left navigation bar that look and behave identically.)
 - Do you avoid having the same button / navigation phrase behave differently in different sections of a site?
 - Do you avoid using one navigation schema (for example, left navigation) in one area, and other schema elsewhere?
7. **Specialized or Local Navigation:**
If a particular set of web pages requires specialized or local navigation, do you apply that navigation to the largest possible logical grouping (such as a topic, an audience, or a complete organizational unit)?
8. **File Formats**
- **Industry Standard Formats:** Do you provide access to documents using open, industry standard web formats (currently, HTML, XHTML, or XML) or alternative formats (such as Portable Document Format), that do not impose an unnecessary burden for the intended audience?
 - **Choosing the Appropriate Format:** When choosing file format(s), do you consider:
 - intended use of the material by your target audience?
 - frequency of use by the target audience?
 - accessibility of the format to the target audience?
 - level of effort and time required by your organization to convert the material to the format?
 - **Preferred Format:** Do you generally use native web formats (HTML, XHTML, or XML) for the greatest flexibility for visitors, especially those that are most frequently accessed by the public?
 - **PDF and Other Alternate Formats:**
 - Do you use Portable Document Formats (PDF), such as Adobe Acrobat, only as an alternate format to native web formats when there is a clear business need to use this format?
 - When using PDF files, do you provide a link to the downloadable free viewer?
 - When using PDF or other non-standard file formats, do you also provide an HTML version of the document whenever feasible?
 - When linking to a non-HTML document, do you include a text description of the file, including the name, file type, file size, and effective date?
 - Do you avoid providing documents that are only available in proprietary formats that require purchase or licensing of commercial software (for example, MS Word, MS Powerpoint, or WordPerfect)?

- If you must use these formats, do you ensure that the intended audience is known to have ready access to the appropriate software or provide a link to download the software?
- **Large, Complex Documents:**
 - In most cases, are large or complex documents (generally, more than 10 - 15 pages), whether in HTML or other format(s), organized into sections or chapters and linked together?
 - For these larger documents, do you also provide a link to download the entire document since some readers may prefer to print the entire document for later reading?
- **Data Files:**
 - Are visitors able to efficiently download available data in a format that allows them to effectively aggregate and disaggregate the data?
 - Do you use Open files (raw data) for the greatest flexibility for visitors over proprietary formats that require specific commercial software?
 - If you must use a proprietary format (for example, SAS, SPSS, SQL, MS Excel etc.) is it used only if the format provides functionality not otherwise available?

E. Search

1. Search Box:

- Do you include either a "Search box" or a link to a "Search" page on every page?
- Is the search box or link entitled "Search" ?
- Is the search box search box placed in the same position on all pages (usually within the upper third of the webpage)?

2. Search Index:

- Does the search index allow visitors to search all files on the website that are intended for public use?
- Do you index the content of your website(s) at least once a month?
- Do you see that content that is added and updated frequently, such as press releases, is indexed more frequently?

3. Sensitive Information: Do you ensure that sensitive, restricted, or classified information or information that contains personally identifiable information (such as social security numbers) is not included in any web-based file that could be retrieved using a government-owned or commercial search engine?

4. Search Results and Response Times:

- On average, does your search engine produce results in less than three (3) seconds?
- Do you monitor and log search response times and ensure that adequate hardware and software capacity is available to achieve the response time standard?
- Are search results displayed in an easy-to-read format that, at a minimum, shows visitors the term(s) they searched for and highlights the term(s) in each search result?

5. Relevancy:

- Do you routinely identify the common search terms used on your website?

- Do you evaluate the relevancy of the search results for those terms?
 - Do you configure your search services to provide the best ranking possible?
 - Do you conduct this review at least quarterly?
6. **Advanced and Broader Searches:**
- Do you allow visitors to conduct more refined, focused searches to achieve more relevant results?
 - Do you accommodate wild card searches?
 - Do you provide options for broadening searches beyond the individual website? (This may include a search of a “parent” organizational unit or a search of the entire federal government using the FirstGov search.)
7. **Search Help:** Do you provide search help, hints, and tips, including examples?
8. **Service Level Standards:** Do you set minimum service level standards for your search capabilities, and monitor how well you are able to meet those standards?

F. Improving Your Site and Making Changes

1. **Latest Research:** Do you keep informed of the latest research in web design, usability, and user behavior to ensure your site follows current industry best practices?
2. **Usability Guidelines:** To the extent possible, do you follow the “Research-based Web Design and Usability Guidelines” published by the Department of Health and Human Services? (See: <http://usability.gov/pdfs/guidelines.html>)
3. **Usability Testing:** Do you periodically test your site with your audience (either through informal testing or more formal one-on-one, lab-based usability testing)?
4. **Customer Satisfaction:** Do you measure the customer satisfaction of your website?
5. **Online Surveys:** Do you use a standard customer satisfaction survey as directed by OMB and selected through a competitive process?
6. **Notifying Visitors of Site Changes:** Do you have a way of informing interested parties and website visitors about changes to your website, both before and after changes have been made? (The method for notifying visitors should consider the magnitude of changes being made.)
7. **URL Changes (including domain name changes):**
 - Do you notify interested parties when you make changes to your primary web address (the domain name, such as changing from www.bcis.gov to www.uscis.gov)?
 - If you change URLs (such as those that occur when a page is removed, renamed, or placed in a different location within the website), do you notify interested parties, especially to URLs of frequently visited pages?
 - Do you minimize URL changes as much as possible, especially for frequently visited pages, since many sites may link to those URLs and those URLs may be bookmarked by many individuals?

- For domain name changes or individual page URL changes, do you insert a “redirect” notice that will automatically take visitors to the new URL?
8. **Navigation Changes:** Do you notify interested parties when you make changes to the navigational or organizational structure of the website?
 9. **Redesigns:** For site redesigns, do you include a notice on the homepage informing visitors about the new design and how it will impact their ability to find information?
 10. **Notifying FirstGov:** Do you notify staff at FirstGov.gov (with as much advance notice as possible), so the new URL is correctly identified in FirstGov’s government-wide domain directory and in the FirstGov search index? (Notification can be sent to: http://answers.firstgov.gov/cgi-bin/gsa_ict.cfg/php/enduser/ask.php)
 11. **Help in Locating New Information:** When a significant number of page URLs change at one time (for example, as part of a redesign or conversion to an automated content management system), do you provide as many ways as possible for visitors to locate the new page locations?

G. Collaboration / Avoiding Duplication

1. **Avoiding Duplication:** Do you avoid duplicating or recreating content that already exists on a federal public website?
2. **Developing New “Portal” Sites:** Before developing new portals do you:
 - ensure the site meets a defined business need
 - include *all* appropriate organizations
 - avoid duplicating existing portals
 - have sufficient resources for the site to be sustainable
 - seek advice from OMB or the Web Managers Advisory Council, who can help you coordinate with other agencies, avoid duplication, and provide advice on getting public feedback
4. **Links to Relevant Cross-Agency Websites:** Do you link to appropriate cross-agency portals when applicable, to guide visitors to additional resources that exist across the U.S. government? (for example, if you have information on a particular topic or for a particular audience for which there is an appropriate, useful government-wide portal, do you link to that “portal” from your page(s) on that topic?)
5. **Link to Government-wide Organizational Directory:** When providing organizational information to visitors (for example, a list of all cabinet-level agencies or independent agencies), do you link to the organizational directory pages on FirstGov.gov, which provides a comprehensive listing of all federal organizations?
6. **Link to Relevant Cross-Agency Websites:** To avoid confusion and clutter, do you avoid linking to cross-agency portals unless those websites are related to your organization’s mission or function? (for example, it doesn’t help your visitors to link to a website about social security if that isn’t part of YOUR agency’s mission)

H. Requirements from Federal Laws, Regulations, or Other Directives

1. **Privacy:**
 - Does your site post your privacy policy on each page?
 - Does your site conduct privacy impact assessments?

- Does your site post a “Privacy Act Statement” that tells visitors the organization’s legal authority for collecting personal data and how the data will be used?
 - Does your site translate privacy policies into a standardized machine-readable format?
 - Are you aware of and do you comply with all other existing laws and directives that address the need to protect the privacy of the American people when they interact with their government?
2. **Security:** Does your site comply with Section 207(f)(1)(b)(iv) of the E-Gov Act of 2002, which requires organizations to have security protocols to protect information?
 3. **Accessibility (Section 508):** Does your site comply with the requirements of Section 508 of the Rehabilitation Act (29 U.S.C. 794d), designed to make online information and services fully available to citizens with disabilities?
 4. **FOIA:** Does your site comply with existing laws and directives that relate to the Freedom of Information Act?
 5. **Information Quality Guidelines:** Does your site comply with section 515 of the Treasury and General Government Appropriations Act for Fiscal Year 2001, Public Law 106-554, “Guidelines for Ensuring and Maximizing the Quality Objectivity, Utility, and Integrity of Information Disseminated by Federal Organizations?”
 6. **Access for People with Limited English Proficiency:** Does your site comply with existing requirements of Executive Order 13166, “Improving Access to Services for People with Limited English Proficiency,” based on Title VI of the Civil Rights Act of 1964, which bans discrimination on the basis of national origin?
 7. **Paperwork Reduction Act:** Does your site comply with the Paperwork Reduction Act (44 U.S.C. Chapter 35) to ensure that information collected from the public minimizes burden and maximizes public utility?
 8. **Paperwork Elimination Act:** Does your site comply with the Government Paperwork Elimination Act (GPEA, Pub. L. 105-277)? The Act requires that, when practicable, federal organizations use electronic forms, electronic filing, and electronic signatures to conduct official business with the public, by 2003.
 9. **Web Records:** Does your site comply with existing laws and regulations related to the management of public web records? (This includes the need for organizations to comply with necessary policies and standards to implement the E-Government Act of 2002, Section 207(e), “Public Access to Electronic Information,” which will be issued by December 2005)
 10. **Copyright:** If your organization uses or duplicates information available from the private sector as part of an information resource, product or service, do you ensure that the property rights of the private sector source are adequately protected? (These protections apply to any material posted to federal public websites, such as documents, graphics, or audio files.)
 11. **GPRA:** Does your site comply with Government Performance Results Act of 2003, which requires organizations to make their annual performance plans readily available to the public?
 12. **No Fear Act:** Does your site comply with the existing No Fear Act Notification and Federal Employee Anti-discrimination and Retaliation of 2002 (No FEAR Act) Public Law No. 107-174)?
 13. **Small Business Paperwork Relief Act:** Does your site comply with Small Business Paperwork Relief Act of 2002, which requires organizations to designate a single point of contact for small businesses, and to post the contact information on the organization’s website?
 14. **Restrictions on Lobbying:** Does your site comply with existing laws that prohibit federal public websites from being used for direct or indirect lobbying?

15. **E-Government Act of 2002:** Does your site preparing to comply with policies and standards to implement the E-Government Act of 2002, Section 207(d)?

16. **Priorities and Schedules for Posting Content:**

- Have you created an inventory of content that all targeted audiences need or want? (The inventory should identify categories of information, such as press releases, publications, and budget documents – not specific documents)
- Have you determined a schedule for posting additional content in the future?
- Have you incorporated this requirement in management plans?
- Have you posted the inventory, priorities, and schedule for posting additional content on the website for comment?

I. Management and Governance

1. **Operating in Emergencies:**

- **Contingency Plan:** Have you developed an overall plan to address what you will do with your website during disasters or emergencies?
- **Website Included in Overall Agency Planning:** Are your website plans documented in, and consistent with, your organization's Continuity of Operations (COOP) plans?
- **Taking Your Website Off-line:** Do you have a plan for when and how your website may need to be taken off-line?
- **System Availability:** Do you have procedures for bringing your site back on-line and ensuring system availability?
- **Updating Information:** Do you have procedures for updating, approving, and maintaining content during emergencies?
- **Critical Information:** Do you know the types of critical information that the public is expected to need most during different types of emergencies?
- **Emergency Contacts:** Do you have emergency contact information for your web staff and web staff at other key agencies who you may need to coordinate with during emergencies?

2. **Web Policies and Procedures:**

- Do you have a plan in place to review and improve web content policies and practices for your site?
- Do you look ahead to new policies and practices that can make federal public websites, both individually and as a group, the most citizen-centered and visitor-friendly in the world?
- In your office do you develop web content policies and requirements in an ongoing process with a formal structure?

3. **Best Practices:** Do you periodically review best practices of other sites to incorporate into your own website?

4. **Overall Quality:** Overall, can a citizen identify your site as an official federal government websites and trust that your website will provide current and accurate government information?

5. **Seamless Government:** Overall, to promote seamless government do you work to simplify and unify information across the government through your site?

6. Hiring and Staffing:

- Are all the members of your web team aware of these requirements and best practices and how their work contributes to meeting these practices?
- Do you have a training plan to ensure that your web staff has the training they need to do their jobs?

7. Compliance:

- Have you determined if you are in compliance with all requirements for federal public websites and that you meet the best practices contained on this website?
- Do you have a process (current or planned) for bringing your site into compliance with federal requirements or for meeting the best practices?