Big Lottery Fund
Standard digital requirements

Introduction

In this document 'service' refers to the digital system/website or feature under consideration. Not all requirements will be applicable to all 'services'. Details of these requirements will need to be agreed with Big Lottery Fund (the Fund) before a project commences.

The quotes shown are criteria from the Government Digital by Default service standards https://www.gov.uk/service-manual/digital-by-default

Supplier must provide documentation that describes how they will meet the points below and the specific service's goals.

Design strategy

> Understand users needs – conduct research to develop a deep knowledge of who the service users are and what that means for digital and assisted digital service design.

Practices such as wire framing and prototyping, together with user testing of the outputs should be used as extensively and early as possible.

User and stakeholder research and consultation should be conducted as extensively and early as possible.

Multiple rapid iterations are encouraged.

See the Government Digital Service Design Principles for more details https://www.gov.uk/designprinciples

Design and build should take a 'mobile first' approach, using progressive enhancement and responsive/adaptive design techniques.

We encourage using agile methodologies.

Design

The service must comply with Big Lottery Fund's branding and house style guidelines and any others as may be required (project specific e.g. minority group; specific target audience) .

Timeline

A plan must be supplied prior to work commencing and then be maintained during the project. It must detail the activities and deliverables along with their expected dates from project start (week 1, week 2, etc.). Adequate time for the Fund to give feedback and then iterate must be planned for and included.

Technologies

Evaluate what tools and systems will be used to build, host, operate and measure a service, and how to procure them.

Use open standards and make all new source code open and reusable, and publish it under appropriate licences (or provide a convincing explanation as to why this cannot be done for specific subsets of the source code).

We encourage the use of open source technologies/platforms.

HTML5, CSS3 and JavaScript shall be used.

The use of Adobe flash is strongly discouraged and if used alternatively accessible content needs to be provided.

Sites such as YouTube, SoundCloud and Flickr shall be considered to for hosting audio visual content and embedding this content instead of hosting it.

Produced source code shall be made publicly available (as much as possible) and be reusable.

Content management system

A method for non-technically skilled staff to manage the content of the service must be provided.

Browser support

The service must work and be presentable in all browsers used by 2% or more of visitors to biglotteryfund.org.uk in line with Government recommendations:
http://digitalstandards.cabinetoffice.gov.uk/browser-testing/

Accessibility and usability

Create a service that is simple and intuitive enough that users succeed first time, unaided..

Put appropriate assisted digital support in place that's aimed towards those who genuinely need it.

The service must be accessible to at least W3C WAI WCAG 2.0 AA standard. For details see

- Big Lottery Fund consolidated accessibility guidelines - http://projects.webcredible.co.uk/guidelines/blf/

- Big Lottery Fund form guidelines (attached)

- W3C WAI WCAG 2.0 http://www.w3.org/TR/WCAG20/

> Create a contingency 'rollback' plan in the event of the service being taken temporarily offline.

The service must include branded friendly error messages not standard system error replies (e.g. server 404 error messages). This includes a basic holding page to be displayed if the service is entirely unavailable.

If your service will contain an application form, provide a non-digital alternative to submit an application (paper based form).

Security

> Evaluate what user data and information the service will be providing or storing, and address the security level, legal responsibilities, and risks associated with the service (consulting with experts where appropriate).

The service must be resilient to at least the OWASP Top 10 vulnerabilities http://www.owasp.com

User statistics and feedback

> Use analytics tools that collect performance data.

> Achieve ongoing high levels of user satisfaction and completion rates

> Put a plan in place for ongoing user testing, including the ability to support multivariate experiments.

The service must include Google Analytics tracking code inserted via Google Tag Manager or equivalent. As well as content, usage of links to files must also be tracked. Tracking of other activity such as carousel clicks as events is also desirable.

The service must be verified with Google Webmaster Tools under the Fund's account and the number of error reports minimised.

The service must provide an easy means for users to give qualitative feedback form anywhere within the service.

Plan for and allocate resources to ongoing reporting on user behaviour, feedback, testing and performance data and react to this to improve the service.

Legal

Evaluate the privacy risks to make sure that personal data collection requirements are appropriate.

The service must provide access to Terms & Conditions, Privacy, Freedom of Information and Cookie policies at necessary. the Fund's T&C's etc. can be used as a reference/starting point.

A cookie usage notification must be displayed to new users if applicable.

Language

If the service is relevant to Wales all end user facing content must be presentable in Welsh via the use of a Cymraeg/English link. This includes content, furniture text and images featuring text. User generated content is exempt but should be segregated by language – ie Welsh comments only shown against Welsh content.

Note that Welsh text is often two-thirds longer than English.

Bilingual logos are also often larger. the Fund can give advice on translation services.

Sitemap

An automatically updated visual and XML sitemap, as defined at http://www.sitemaps.org, that respects anonymous user access privileges must be provided and reference in the service's robots.txt file.

Search

A keyword search that respects the user's access privileges must be provided to users.

A facility for administrators to be able influence the search results such as by weighting certain pages is desirable.

(Google) Analytics must be set up to record usage of the search

Social media

Pages on the service should normally feature buttons to share the current content on Facebook, Twitter, Google+ and LinkedIn. This functionality will permit the provision of Open Graph metadata to ensure a title, graphic(s), text etc. is presented when posted in these channels.

A social media engagement strategy for the site should be developed as necessary

Collaboration with the project team

Online collaboration tools such as Basecamp. Huddle or Trello shall be used.

An addition to these tools may be a tracker such as: Redmine, Trac or Kanban to collect feedback and track the resolution of issues.

Testing

> Be able to test the end-to-end service in an environment identical to that of the live version (using dummy accounts and a representative sample of potential service users) on all common browsers and devices.

The supplier will make the service available for testing by Big Lottery Fund and third parties, on the same or an as similar as possible environment to the live environment. The supplier will provide documentation of the anticipated common user journeys.

We encourage use of techniques such as unit tests, continuous integration and automated testing.

The results of testing and user feedback shall informed subsequent stages of development.

For testing phase(s) clear entry and exit criteria need to be defined and agreed with the Fund.

For each testing phase the following need to be defined and agreed with the Fund.

a) criteria for testing to be initiated and

b) criteria for testing to be considered completed to a satisfactory level and that the service can be signed off ready for implementation into a production environment.

For more on these criteria and approach to testing read our User acceptance testing generic policy.

The Fund requires the quality of the service to be certified by independent, expert third parties – that it is:

- compliant with AA standard of the W3C Web Content Accessibility Guidelines 2.0
- resilient to the OWASP top ten security vulnerabilities http://www.owasp.com
- able to cope with X concurrent users without appreciable dip in performance (depends on KPIs).

A list of suppliers that the Fund has worked previously with:

- Accessibility
  - Nomensa
  - Abilitynet
  - Digital Accessibility Centre
- Security
  - Nettitude
- Performance
  - NCC Group

For each criteria:

- At launch the service must be as compliant as possible. To achieve this:
  - each third party should conduct at least one assessment during development, late enough to be effective but early enough for issues discovered to be resolved.
  - the results of the assessment, broken down by high, medium and low priorities, must be reported to the Fund and the supplier simultaneously.
  - the supplier must normally deal with at least all the high priority issues discovered and report the remedial action taken to resolve them, to the Fund before go-live. This has to be defined and agreed with the Fund via entry and exit criteria of any UAT phase(s).
- The third party shall conduct a full audit of the site immediately after go-live.
- The results of the audit must be reported to the Fund and the supplier simultaneously.
- The supplier must satisfy the third party that any issues found are resolved and hence the certification must be achieved within 2 months of the audit.
- The costs associated with any (re-)testing, and remediation work is to be met by the supplier as part of the contract.
- Certification constitutes a payment milestone for the supplier, normally 5% of the contract's total value.

Warranty

The supplier will provide a 30 day warranty for the service. They will fix any issues, as quickly as possible where the service ceases to provide the functionality as it did when it was signed off.

Installation

> Make sure that you have the capacity and technical flexibility to update and improve the service on a very frequent basis.

The supplier will provide support for any installation required on development, test or production infrastructure, particularly for any non-standard components.

The service should be built so that new instances can be easily deployed to new environments. Similarly for deploying changes to the service. These processes should be as automated as possible to rapidly, reliably and repeatedly push out enhancements and bug fixes at low risk and with minimal manual overhead - continuous delivery.

Training

The supplier will provide documentation and training materials on how to use the site's content management system, particularly for any bespoke or non-standard components

Ongoing support

The supplier shall provide details of rates, on a contract or ad-hoc basis, for support services which may be required after launch.

Success

> Create a plan (with supporting evidence) for achieving high digital take-up.

The supplier and the Fund shall agree key performance indicators and objectives for the service, These should include:

- User satisfaction

- Digital take-up (metrics such as number of interactions or conversions)

Additional KPIs may be defined