



**DrupalCon**  
PORTLAND2024  
6-9 MAY

# Sandstorm + Milken Institute

Hitting 'Save As' & Transforming  
UX, Taxonomy & Search for a Think Tank Website





sandstorm®

# Hi, we're Sandstorm®

Accessibility-certified, digital experience technology agency for [purpose-driven brands](#)



- + **25+ yr** old digital experience design agency
- + **4,600+ hrs** of usability & UX research
- + **15+ yrs** building sites in Drupal
- + **CPACC (Accessibility)** certified
- + **WBENC** certified (women-owned)
- + **Yes, And...** philosophy





# Project Snapshot



The **Milken Institute** is a **nonprofit, nonpartisan, global think tank** with a focus on finance, health and philanthropy.

We did research, design and development for their soon-to-launch new website.



2024 GLOBAL  
CONFERENCE  
SHAPING A SHARED FUTURE



## Case Study Overview

- Discovery
- Collaboration & Architecture Principles
- Taxonomy
- Search



# Before



 Search Milken Institute



Explore the program for the upcoming 2024 Global Conference, taking place May 5-8, 2024.

[VIEW PROGRAM](#)

EVENT

## Global Conference: May 5–8, 2024

Join us for our 27th annual Global Conference, where thought leaders, innovators, and change-makers will convene to explore the theme "Shaping a Shared Future."

[VIEW AGENDA](#)

REPORT

Building a Resilient America: The New Consensus for Action

EVENT

Global Conference: May 5–8, 2024

REPORT

Modernizing Care for Obesity as a Chronic Disease: A How-To Guide for Employers

POWER OF IDEAS

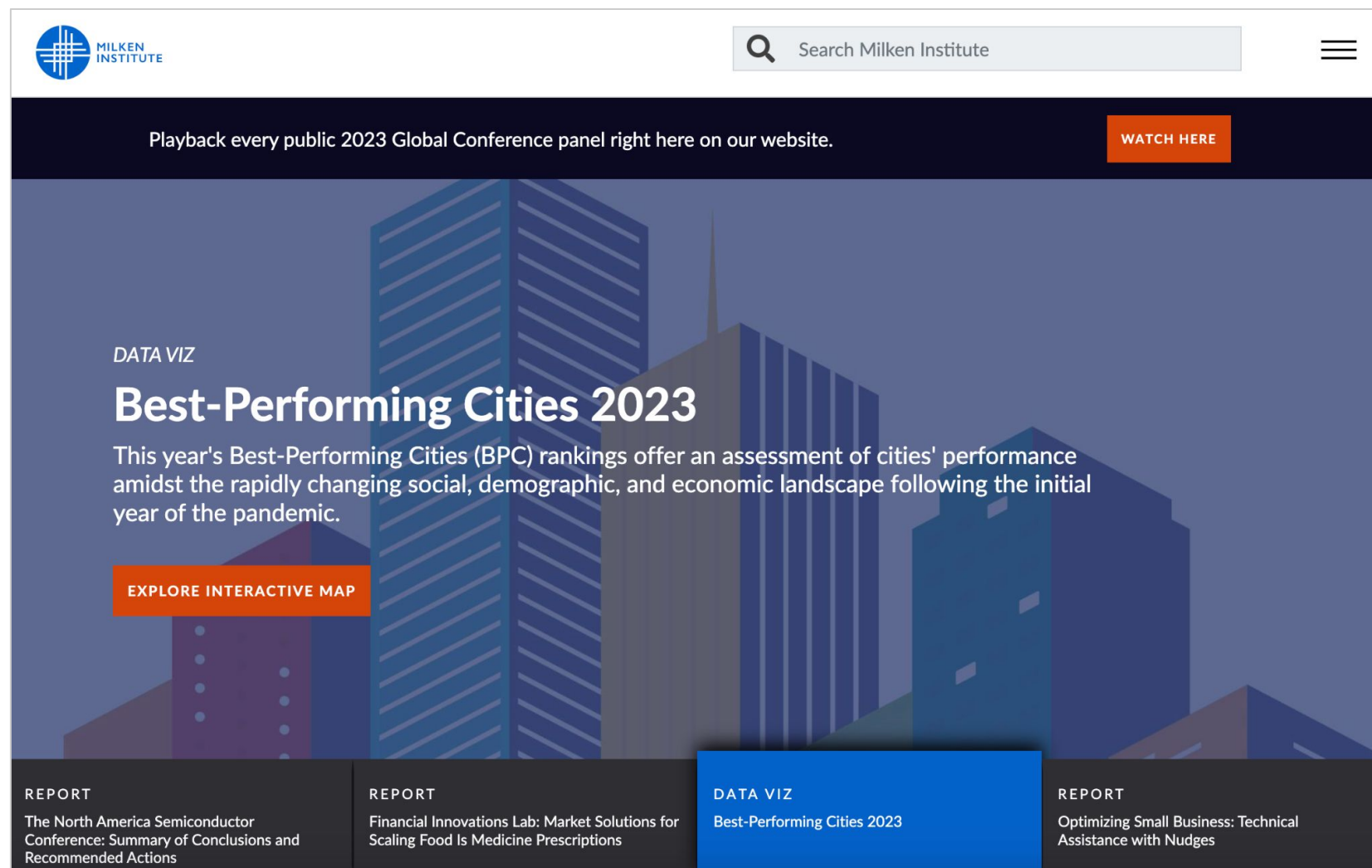
Global Conference 2024 Collection

Catalyzing Solutions. Building Meaningful Lives.





# Biggest Opportunities



- Better articulate **who they are and what they do.**
- **Improve visitor engagement** (most visits 2 pages or less).
- **Provide stronger conversion opportunities.**
- **Improve site performance and reliability.** The experience was dominated by loading spinners and sporadic outages.



# Biggest Challenges



1. Timeline
2. Limited access to users
3. Equipping in-house team for ownership
4. Mission-critical event functionality



# Discovery & Personas (...in a hurry)



- Stakeholder workshops, targeted follow-ups
- User interviews (1:1)
- Social media profile review
- Analysis of successful existing assets
- Content inventory
- Analytics
- Competitive analysis (AI)



# “Save As” or Clean Slate?



**The current site was on Drupal 10.**

**Benefits of Building from Existing Site:**

- Limit the needs for content migration
- Eliminate the need to rebuild the Salesforce events integration

**Drawbacks:**

- Living with or addressing previous development choices
- Risks/fears that it was a bad egg that couldn't be saved





## Decision: “Save As”



**After conducting a code audit, we decided to work from the existing site.**

1. Picked a cut over date (after which new content would be created on both sites)
2. Developed a Drupal architecture plan marrying existing content to future designs (creating, transforming or leaving as is)
3. Brand new theme and introduction of Layout Builder



# Drupal Architecture: Guiding Principles



## 1. Be nice to content admins present and future

Viewable pages should be managed as **content types** for simplicity in content management, templating, and not fighting Drupal.





## 2. Be stingy in introducing new content types

Add one when:

- Content requires a unique set of fields
- A default Layout Builder layout will encourage consistency



# Drupal Architecture: Guiding Principles



## 3. Minimize any changes

To events-related entities that have dependencies on Salesforce integration





## #1 Thing We Heard in User Interviews

The desire to have content readily labeled by very specific topics.

- 1000s of nodes to tag
- 17 existing vocabularies
- Strong SME opinions on labels
- Project success tied to getting this right





## 1. Reduce/Reuse/Recycle

- Round up similar vocabularies
- Consolidate, remove duplicates, remove vague terms
- Pick the best closest one
- Transform: Update terms, delete terms, nest





# Taxonomy Wins



## 2. Nest

In order to deliver on the narrow/specific terms our users wanted, we would need 80+ terms making nesting important.





# Taxonomy Wins



## 3. Use AI to refine

### Example Prompt

“How would you organize and revise these terms into a website taxonomy that is **clear, hierarchical and optimized for search?**”





# Taxonomy Wins



## 4. Negotiate

Review with SMEs to check for omissions or inaccuracies





# And a Menu to Support It



The screenshot displays the Milken Institute website. At the top left is the Milken Institute logo. To its right is a search bar. Further right are links for "MI Insights", "MCAAD", "About" (with a dropdown arrow), and a "LOG IN" button. Below this is a dark blue navigation bar with the following items: "Topics" (dropdown), "Events" (dropdown), "Experts", "Content Hub" (dropdown), "MI Health" (dropdown), "MI Finance" (dropdown), "MI Philanthropy" (dropdown), and "MI International" (dropdown). The main content area features a large background image of a historic building with a clock tower and palm trees. Overlaid on the left is the text "Catalyzing Solutions. Building Meaningful Lives." On the right, a blue box contains the text: "REPORT", "Best-Performing Cities 2024: Focus on Sustainable Growth and Resilience", and "February 06, 2024". At the bottom, the text "Trending Insights" is centered, with the "Insights" part underlined. In the bottom right corner, the "sandstorm" logo is visible.





# Search



73 results for:

happiness



SHOW ADVANCED  
FILTERS

Sort by

Relevance

Results per page:

12



PERSON

Laura Carstensen

Laura Carstensen is a professor of psychology and the Fairleigh S. Dickinson Jr. professor in pub

[+ Read More](#)

Nov 30, 2023



PANEL

Happiness and Sustainability: Changing Our Approach to Growth

We live in a world that often values output, busyness, and economic growth over subjective outco

[+ Read More](#)

May 7, 2024



PANEL

Wellness Lounge | Happy Not Perfect

Dec 7, 2023



PANEL

Happiness is a Warm Puppy

Puppy playtime has been shown to reduce blood pressure, promote focused interaction with others,

[+ Read More](#)

May 1, 2019



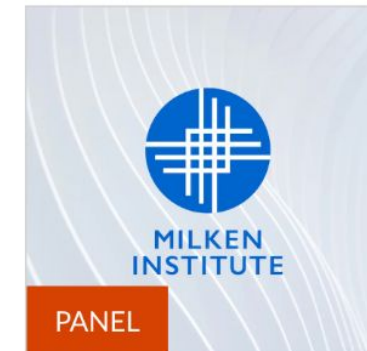
PANEL

Happiness is a Warm Puppy

Puppy playtime has been shown to reduce blood pressure, promote focused interaction with others,

[+ Read More](#)

Apr 30, 2019



PANEL

Happiness is a Warm Puppy

Puppy playtime has been shown to reduce blood pressure, promote focused interaction with others,

[+ Read More](#)

Apr 29, 2019

**The existing Solr search got a bad rap** because of poor performance and design.



Search



# Frequently requested features went undiscovered behind “advanced filters.”

73 results for:

happiness



HIDE ADVANCED FILTERS

Sort by

Results per page:

Relevance

12

Content Type



Centers and Programs



Topics



Tags



Refine by Date



APPLY FILTERS

Reset Advanced Filters







# Search: Implementation



## Search Web Components

by Kyle Einecker ([ctrlADel](https://ctrlADel.com))  
[drupal.org/project/search\\_web\\_components](https://drupal.org/project/search_web_components)

Module provides a library of **flexible components** built on top of **Decoupled Search API endpoints**.

Leveraged for a variety of filterable experiences:

- Site Search
- Topic Pages
- List of Experts
- Event Program

**“Gone are the days of fighting with Views and Ajax to get a half working search that site owners are *kinda* okay with.”**



# Search: Improved Design

- **Only filters that limit the list** appear
- **List updates instantly** when filters are selected
- **Filters are exposed** with collapsing and show more options as needed
- **Autocomplete dropdowns** for long lists (experts, events)
- **Number of results** indicated and user controls for how many to show
- Path to **sibling pages**
- **Context-rich** results

The screenshot displays the Milken Institute website's search results page for 'Private Equity'. The header includes the Milken Institute logo, a search bar, and navigation links for 'MI Insights', 'MCAAD', 'About', and 'LOGIN'. A secondary navigation bar lists various topics like 'Topics', 'Events', 'Experts', 'Content Hub', 'MI Health', 'MI Finance', 'MI Philanthropy', and 'MI International'. Breadcrumbs show the path: HOME > TOPICS > FINANCE > FINANCIAL MARKETS.

## Private Equity

We examine the role private equity plays by analyzing the dynamics of private equity markets, assessing their impact on economic growth, and providing informed, research-based policy recommendations.

+ Other topics in Private Equity

Showing 1-2 of 2 results

SHOW PER PAGE: 10 SORT BY: Newest to Oldest

### Filters

**Topics** +

- ☐ 0
- ☐ Diversity, Equity, and Inclusion
- ☐ Environmental Impact
- ☐ Financial Markets
  - ☐ Private Equity
- ☐ Venture Philanthropy
- ☐ Social Entrepreneurship

**Types** +

- ☐ Power of Ideas

**Experts** +


Start typing... ▼

**Event** +

Select an event ▼

**Content Type** +

- ☐ node--article (2)



POWER OF IDEAS

### ESG and Profits: Not Mutually Exclusive

People matter, the planet matters, but so, too, do investor returns. To many, the consideration of environmental, social, and governance (ESG) issues is at odds with the notion of profit maximization. However, these objectives need not be conflicting...

[Read More](#)


KB C

6 Oct 2021

Environmental Impact

Private Equity

Social Entrepreneurship



POWER OF IDEAS

### How 2020 Changed Private Equity's Approach to ESG

A confluence of global crises in the last 18 months has sparked a broad reassessment of mission and purpose on the part of companies, investors, and key institutions. In private equity (PE), which has been a laggard in addressing environmental...

[Read More](#)

VM

6 Oct 2021

Diversity, Equity, And Inclusion

Environmental Impact





# Lessons Learned



## What We Would **NOT** Do Again

1. Rely as heavily on manual retagging
2. Wait to leverage AI for taxonomy
3. Saddle the in-house team with deployments

## What We **WOULD** Do Again

1. User research to drive the direction for the navigation and how users expect to see related content displayed
2. Err on the side of transparency and collaboration
3. Use of Search Web Components



# We love questions! And making Drupal friends!



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