TRU Website Redesign

Project Charter

1/21/2011

Thompson Rivers University Web Project Team

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**INTRODUCTION**

This project charter defines the vision of the Web Redesign project. In general terms, it defines what is in scope and what is not. The objectives and goals are listed as well as criteria to measure our success. It lists participants, their roles and authority and the amount of time the project requires. This document formally authorizes the project to begin, testifies to the organizations support and allows mobilization of resources for the project to begin.

**Background**

The Web Redesign Project seeks to address challenges associated with TRU’s online presence through a pan-campus initiative that will greatly improve marketing and communications in every business and academic unit. This project will result in a completely redesigned TRU online presence and the development of supporting documentation.

Our target student demographic utilizes the web as the primary tool to gather information, weigh choices and submit applications. It is pivotal to the recruitment goals of TRU World, Open Learning and the Recruitment & Liaison divisions that our website work effectively and encourage positive user experiences.

Our web presence is the university’s primary communications vehicle and information source to the world with over

500,000 views a month. In 2005, when TRU transformed into a university after the amalgamation of UCC and the BC Open University, the website was redesigned and a web content management system was adopted. This system is still in use today.

These changes in 2005 were an improvement, but challenges still exist. These include:

* The appearance and design of tru.ca is stale. At 6 years old, the look and feel of the university’s main marketing vehicle has become dated and unappealing.
* With over 20,000 pages, the website contains too much content. This obfuscates our primary goals and makes the most sought after information difficult to find.
* Individual pages contain too much information and are not written for the web medium.
* The distributed approach to content creation causes a lack of content consistency. Information is duplicated and often differs between pages.
* Our main website is not designed to work well with mobile devices and our mobile website is not consistent with the visual identity of our main website.
* Editors, often with limited skills and experience find it difficult to create usable, visually appealing pages.
* The visual design still differs across the website enough that visitors are without common navigation tools to our primary online tasks.
* Navigation of the main TRU website is difficult. In most cases, the website is organized by our internal departmental structure and not what is logical for visitors.

**Project Goals and Objectives**

**Project Goal**

Thompson Rivers University is a comprehensive, learner-centred, environmentally responsible institution that serves its regional, national, and international learners and their communities through high quality and flexible education, training, research and scholarship - our website should reflect that.

We wish to engage an external agency to do a comprehensive redesign of our web presence, including the presentation, information architecture, guidelines for web development and strategies for web communication. This will create a consistent, interactive and user-friendly structure that serves every area of the institution. TRU needs a consolidated and comprehensive examination of its most important mass communications medium.

**Project Objectives**

This project seeks to improve TRU's web presence with an updated, compelling visual design and intuitive information architecture. Our vision is a unified, effective web presence, with modern visual designs and information architecture that encourages positive and rewarding interactions.

The project will also result in strategy and guideline documents for effectively communicating online and effective management of our website. These will assist our content providers in creating usable, appealing websites.

The driving principles of this work include: a focus on the needs of our target audiences; an ability to showcase the unique strengths and diversity of TRU; and a web experience on par with other leading post secondary institutions.

The primary goals of this project are:

1. Engage a web development/design consultant to assist in analyzing the current state of TRU’s web presence, identify and implement critical improvements, and develop a modern, compelling interface design (look and feel) and a set of design templates
2. Create a complementary set of designs for our mobile website, ensure the main TRU website is mobile friendly and develop a strategy for the TRU’s online presence on mobile devices
3. Create a fluid and rewarding website information architecture that reflects the needs of our visitors and encourages positive user interactions
4. Establish a strategy that articulates how the web will be used as a communications tool in alignment with the Universities goals and objectives
5. Establish policy and standards for website management, design, content, presentation and development for creating consistent and professional web content.

**Out of Scope**

The following are specifically out-of-scope for this project:

* Any change to the website hosting services
* Integration with external data sources and applications

**Business Drivers**

TRU’s ability to achieve its organizational goals will depend increasingly on recruiting and retaining the best and brightest students, staff and faculty. The TRU website is often the first point of contact, the first impression and the most critical communication tool available in these efforts.

**Student Recruitment**

Our website is the first introduction and most critical communication tool for potential students who measure, rank and weigh their options online. Domestic enrolment numbers are stable, but not increasing to desired levels. TRU's web presence must not only exemplify the excellence of our institution, but convey information in a way that fosters positive, productive interactions. Our recruitment efforts will be bolstered by an effective web presence.

**Student Engagement**

Current students browse the website for course and program information, to find event listings and for entertainment, multimedia and news. Engaging students will be easier with a web presence that is more effective at communicating. The success of this project will result in better results in student satisfaction surveys like NSSE.

**Open Learning Recruitment**

Open Learning students typically have very specific objectives in mind when registering for online or distance courses. The website is a primary tool for registration and therefore must be concise, intuitive and informational. It must also convey Open Learning as a credible, quality post-secondary distance education provider and build confidence in both the institution and the education we deliver. Open Learning recruitment efforts will be strengthened by this project.

**TRU World Recruitment**

International Students rely heavily on web and prepared marketing material when deciding to attend TRU. Our website must present a modern visual design that promotes and attracts people to our region and our campus. The promotion of TRU and Kamloops can be greatly enhanced with a more effective web presence.

**Employee Recruitment**

Our future also depends on recruiting the best and brightest faculty and staff. Our website is the first stop and first impression for many prospective employees. A frustrating, disorienting experience is counterproductive to recruitment and retention efforts and reflects poorly on the organization. Employee recruitment will be enhanced with a stronger web presence.

**Faculty & Staff Involvement**

Current employees utilize the website everyday for information and assistance in their day-to-day tasks. They also look to the website for news and official announcements. An organized, consistent website can increase organizational efficiency. Using our website more effectively as a communication tool can increase employee involvement and engagement.

**Stakeholders & Clients**

**Internal Sponsors**

This project is sponsored by the divisions of Advancement, Open Learning, TRU World, Recruitment & Liaison and IT Services. This partnership between the outward-facing presentation of the university and the underlying technologies that support web presence is a foundational aspect in reaching our goals. The support of each Executive Sponsor is necessary for the success of the project.

**Target Audiences**

TRU websites are used primarily by four key audience groups – future students, current students, faculty & staff, and the community. Additional audiences include parents, alumni, news media, and online visitors from across the educational, research and public service communities.

**University Marketers and Communicators**

Advancement, Recruitment & Liaison, TRU World and Open Learning work to promote a broad understanding of and appreciation for the academic programs and projects of TRU by coordinating news media coverage for the campus, producing printed and online publications and marketing documents, and developing communication strategies for the University.

**Campus Constituencies**

Nearly all campus constituencies are engaged in delivering information and services via the web in support of the core university mission. Their individual web presences are usually an authoritative and first point of contact for their business purposes.

**Sponsorship Communication**

TRU’s existing website has over 300 content authors and publishers. Faculty and Staff will have a need to feel consulted and informed about the project. It will be essential to ensure effective communications by:

* Maintaining communication with TRU’s lines of business and regional campuses
* Posting frequent project updates and communicating successes throughout the project

**Approach**

This section describes high-level phases for this project, with the individual work products.

A*nalyze the current state of TRU’s web presence, requirements gathering, define best practices and identify critical* *improvements*

|  |  |
| --- | --- |
| **Outcome** | **Work Products/Description** |
|  |  |
| Conduct Current State | Execute end-user functionality analysis, review of current web sites, best practices, focus group |
| Analysis | interviews, information architecture design, visual design templates to evaluate and analyze the current |
|  | state of TRU’s web presence. |
|  | Perform a review the existing CMS and examine un-utilized components and opportunities we are not |
|  | taking advantage of. |
|  |  |
| Project Scope | Define in-scope web sites for design and information architecture, scope of design templates creation, |
|  | and standards/policies that this project will address. |
|  |  |

*Engage a web development agency*

|  |  |
| --- | --- |
| **Outcome** | **Work Products/Description** |
|  |  |
| Scope of Work Document | Define the scope and deliverables in consultation with a web design agency, with focus on: End-user |
|  | functionality analysis, focus group interviews, information architecture design, and creation of visual |
|  | design templates and style guides. |
|  |  |
| Agency Agreement | In coordination with the Purchasing Department, execute a Request for Proposals and negotiate an |
|  | agreement for services with a qualified web development agency. |
|  |  |

*Create a fluid and rewarding website information architecture that serves our target audiences effectively;*

|  |  |
| --- | --- |
| **Outcome** | **Work Products/Description** |
|  |  |
| Information architecture | Based upon current state analysis, project scope, and input from key stakeholder groups, develop |
| recommendation | recommendations for information architecture for the university website. |
|  |  |

*Develop a modern, effective visual design for both the main TRU website and the mobile website. Ensure the main TRU website is mobile friendly and develop a strategy for the TRU’s online presence on mobile devices*

|  |  |
| --- | --- |
| **Outcome** | **Work Products/Description** |
|  |  |
| Updated visual design for the | Obtain design requirements from key constituencies through focus groups. Draft wireframes, design |
| TRU website. This includes the | mock-ups, and final draft templates. |
| mobile website. |  |
|  |  |
| Suite of design templates for | Develop a suite of templates incorporating the updated visual design compatible with the existing |
| campus divisions and | content management system |
| departments |  |
|  |  |

Cross-browser testing, Stakeholder reviews, User experience reviews

*Establish standards for design, content, presentation and development for creating consistent and professional web content. Establish a strategy that articulates how the web will be used as a communications tool in alignment with the Universities goals and objectives*

|  |  |
| --- | --- |
| **Outcome** | **Work Products/Description** |
|  |  |
| Standards and guidelines for | Develop core standards for branding, navigation, accessibility, and compliance with relevant policies and |
| design, content, and | regulations. Develop presentation standards for common types of information to ensure data is |
| development | presented in a consistent format across the site (ie programs and courses) |
|  |  |
| Strategy and guidelines for | Develop and document a strategy for using the website to communicate the organizational goals and |
| using the website as a | objectives. |
| communication tool |  |
|  |  |
| Recommendations for next | Develop and document recommendations for the future development to the website or to the processes |
| steps for policy/standards | and structure that maintain the website. Identify plans for items out of scope in this project or are |
| development | identified during this project. |
|  |  |

**Success Criteria**

This project will be successful if the following conditions are met:

* Stakeholders are engaged throughout the project and their requirements are documented.
* Dependencies with other online projects such as, but not limited to, Banner, myTRU, Blackboard and Moodle are identified and coordinated and associated risks are mitigated.
* External consultant is successfully managed to produce deliverables within scope, budget, and project schedule.
* Information architecture designs are created and incorporated into design templates and production web environments.
* Designs and templates are created and incorporated into production web environments.
* Confidence in the existing content management system increases.
* A set of standards for branding, navigation, accessibility, and compliance with relevant policies and regulations are developed and approved by governance, along with recommended priorities for future standards development.
* Toolsets and training for development of local information architecture and web design are documented and delivered to university web service staff.
* Feedback from audience groups on design and information architecture is positive.

**Project Structure**

**Staffing**

|  |  |  |
| --- | --- | --- |
| Role | Name | Responsibilities |
|  |  |  |
| TRU Executive |  | Ultimate authority and responsibility for the program and projects. |
|  |  |
|  |  | Approve changes to scope, identify and secure funding, approve |
|  |  | deliverables |
|  |  |  |
| Steering Committee | Christopher Seguin | Makes business decisions for the project, participates in key |
|  |
|  | Brian Mackay | activities, makes resources available, approves work products, |
|  | Kate Sutherland | addresses issues and approves change requests |
|  | Gordon Tarzwell |  |
|  | Christine Adam |  |
|  | Lucille Gnanasihamany |  |
|  |  |  |
| Project Management | Matthew Tarzwell | Develops project charter and related RFP documents. Establishes |
| Team |
| Craig Riggs | project scope and requirements. Selects design/development |
|  |
|  | Ruth Hughes | vendors and works with the agency team(s) to ensure that all |
|  | Brianna Swayze | project goals, requirements, and deliverables are successfully |
|  | Cristian Sonea | addressed. Individually, each member of the team represents a |
|  |  | significant stakeholder/sponsor group in the project, and is |
|  |  | responsible for ensuring that the perspective and requirements of |
|  |  | each stakeholder is appropriately reflected and addressed |
|  |  | throughout the project. |
|  |  |  |
| Project Manager | Matthew Tarzwell | The project manager coordinates the work of the project team and |
|  |
|  |  | manages the overall process of work for the project. |
|  |  |  |
| Content Leads | Project Management | Represent content perspective in project team meetings and |
|  |
|  | Team & content creators | interactions with design consultant. Contribute to key content |
|  | from our Marketing | discussions and deliverables. Review, contribute to, and comment |
|  | departments | on content work products. |
|  |  |  |
| Information | Ruth Hughes | Represent information technology perspective in project team |
| Technology Lead |
|  | meetings and interactions with design consultant. Contribute to key |
|  |  |
|  |  | information technology discussions and deliverables. |
|  |  | Review, contribute to, and comment on information technology |
|  |  | work products. |
|  |  |  |
| Web Standards Design | Project Management | In coordination with the Web Steering Committee, this team will |
| Team |
| Team & Graphic | develop the initial set of campus web standards |
|  |
|  | Designers from |  |
|  | Marketing and |  |
|  | Communications |  |
|  |  |  |

**Project Management**

Project management involves activities necessary to ensure the successful completion of the project. Project management activities include: (1) Project Control, (2) Project Planning, (3) Status Reporting, (4) Issue Management, (5) Change Management, (6) Risk Management, and (7) Quality Management.

**Project Control**

The Project will establish a project organization (see Section 2.1 above) with the mandate to meet project, technical, scheduling and cost requirements. The Project Manager will be given full responsibility and authority to execute all aspects of the TRU Web Redesign Project within the scope as defined by this Project Charter.

**Project Planning**

The Project Management Team will prepare and maintain a detailed project plan that serves to govern tasks and activities necessary to complete the project. The Project Plan entails target dates for key milestones and deliverables.

**Status Reporting**

The Project Management Team will conduct biweekly progress reviews and prepare monthly status reports for presentation at the Project Steering Committee monthly meetings. The progress reviews will cover technical, schedule related and resource aspects of the project. Status reports will focus on the accomplishments for the concluded reporting period, the planned activity for the next reporting period, and the identification and resolution of project issues.

**Issue Management**

Issue management is a process designed to address issues that may arise during the course of a project. Issues are always associated with some degree of risk to the project and therefore need to be assessed and resolved in a timely manner either within or outside of the project boundaries. Issues need to be resolved in a consistent and disciplined manner in order to maintain the quality of the deliverable, as well as to control schedules and cost.

The Issue Management Process provides the mechanism to ensure that issues are properly identified and documented, escalated for management review, and resolved quickly and efficiently. It includes (1) procedures for the identification, assignment and escalation of issues; (2) level of management that needs to be involved for escalation; (3) target timeline for issue resolution; and (4) the tracking of issues. The process is designed to handle technical problems or issues as well as to address process, organizational and operational issues.

**Raising and Submitting an Issue**

1. Any project team member may raise project issues with a pre-designed Project Issue form.
2. The originator must assign a tentative priority to the issue together with a designated Issue Owner.
	* **Critical** –presents an immediate and critical obstacle to project work and deadlines.
	* **High** –may impact critical deadlines or the quality of major deliverables.
	* **Medium** –may impact future, less critical deadlines or sub-components of a deliverable.
	* **Low** –has no direct impact on any deadlines or quality of deliverables.

**Logging and Assigning Issues**

1. The Project Management Office Team will review submitted issues and assign issues to the appropriate issue owner(s).
2. Once assigned by the Project Management Team, the designated Project Manager will record the issues onto the Project Issue Log.
3. The designated Project Manager will update the Project Issue Log with the appropriate status:
	* **Received** –any issue that has been submitted but not yet accepted as an **Open** issue.
	* **Open** –any issue that has been accepted as a valid issue and is still in progress.
	* **In Progress** –any issue that has had work started on either its resolution or analysis.
	* **Deferred** –any issue that has been deferred to be resolved at a later bring forward date for statedreasons or any issue that has a temporary solution with the proviso that the issue be brought forward at a later date.
	* **Waiting Approval** - any issue that has been resolved but is awaiting approval by the Team Lead Group.
	* **Resolved** –any issue that has been resolved to the project team satisfaction.

**Managing Issue Resolution**

1. The designated Project Manager will ensure that all stakeholders agree with the target resolution dates.
2. The designated Project Manager will monitor the progress of outstanding issues within the following general guidelines:
	* **High** –within 3 working days
	* **Medium** –within 10 working days
	* **Low** –best effort basis
3. The issue priority may be changed for valid business, technical, logistical or timing reasons. The designated Project Manager will assess the validity of the change request in conjunction with all affected parties.
4. A designated Team Lead will escalate high priority issues as they become overdue:
	* **3 working days overdue** –Issue Owner
	* **5 working days overdue** –Project Management Team
	* **10 working days overdue** –Implementation Steering Committee
5. Once the issue is resolved, the issue owner(s) will notify the designated Project Manager who will obtain agreement from the individual who raised the issue.

**Reporting Status**

1. The designated Project Manager will track and update the progress status of all outstanding issues.
2. The designated Project Manager will produce biweekly status reports for open, overdue and deferred issues as well as additional analysis reports that may be required by the project team. Note: Project team implies the Project Management Office (PMO) and respective Work teams.
3. The most current list and status of open issues may be found in the Issues Management Log.

**Change Management**

The Change Management Process provides a mechanism to manage request for changes to any project deliverables, including project scope and schedule. This process allows for change during the project’s life cycle but always puts in the context of the latest project plan between the project team and management and, in the case of the contractors, as contractually agreed to. The following change control procedures consists of a series of steps that allows change to be identified, evaluated, priced and tracked through closure.

1. Change requests must be submitted, with a pre-designed change request form, to the Project Management Team for review and assessment.
2. Once accepted as valid, the Project Management Office Team must submit change requests to the Project Steering Committee for approval.
3. The Project Manager must refine the project plan to incorporate tasks and activities resulting from any approved changes.
4. The designated Project Manager must record all change requests and update the Change Request Log to reflect the status of each change request.
5. The designated Project Manager must log any minor changes (i.e., low impact on costs or time schedule) and circulate them for information.

**Risk Management**

Risks are inherent in any project. A risk is defined as any factor that may potentially interfere with successful completion of the project. The challenge is to manage risks with a process that is unique to the project and reflects its operational environment (i.e., resources, complexity, size, etc.). It is important to recognize that risks are not events that have occurred, but rather events that might occur that would adversely impact the project. Events that have occurred and are impacting the project are addressed in either the Issue Management Process (see Section 2.3.4) and/or the Change Management Process (See Section 2.3.5).

Risk identification, risk action planning and risk monitoring are key tools to successfully completing a project. Part of controlling a project during its execution life cycle is to have an established risk management process. The iterative risk management process commences as part of project planning and continues to evolve until the project close out.

**Risk Identification**

Risk identification provides the project team the opportunity to alert management of potential risk factors before they become real threats to the project. Risks are listed, analyzed for probability of occurrence and potential impact on the project, and prioritized. Risk identification occurs at the beginning of the project and continues throughout the project’s life cycle.

14. The project team will assemble an initial list of risk factors with impact analysed and priority assigned.

1. Any project team member may identify ‘new’ or additional risks at any time using the pre-designed Risk Management Control form.
2. In identifying project risks, the originator must complete the Risk Management Control form and provide information as follows:
	* Risk Identifier – the unique identifier for the risk statement
	* Risk Sources – the focus area, risk factor category and risk factors
	* Risk Condition – the existing conditions that may negatively impact the project
	* Risk Impact – the potential impact if the identified risk materialises
	* Risk Probability – the likelihood that the risk will actually occur
	* Risk Exposure – the overall threat of the risk to the project (Note: This is typically used to establish ranking.)
	* Risk Context – background information that serves to clarify the risk situation
	* Related Risks – inter-dependent risks
3. The originator must submit the Risk Management Control form to the Project Management Office (PMO) for review and action.

**Risk Action Planning**

Risk action planning produces plans for addressing each major risk item and co-ordinates individual risk plans with the overall project plan. Risk planning ensures that project schedules and/or cost estimates are adjusted to ensure that adequate time is appropriated to properly develop and execute risk mitigation measures when required.

1. The Project Management Office (PMO) will meet regularly to review existing and newly identified risks and to develop action plans to mitigate such risks.
2. The Project Management Office (PMO) will designate a project team member responsible for the agreed-to risk mitigation measures.
3. The Project Manager will adjust the ‘master’ project plan to reflect time estimates required for the execution of risk mitigation measures.

**Risk Monitoring and Control**

Risk monitoring and control involves the tracking of progress towards resolving identified risks and taking corrective action as planned. Risk tracking is essential to ensure that corrective actions have been executed as planned and are effective in mitigating the identified risks. Risk status-reporting serves to communicate the four possible risk situations: work-in-progress, resolved, change or re-work required, or newly identified.

1. The designated Project Manager will provide regular updates of all identified risks.
2. The Project Management Office (PMO) will meet regularly to review the statuses of all identified risks.
3. The designated Project Manager will produce regular risk status reports for review by the Project Steering Committee.

**Quality Management**

Quality and completeness of deliverables are managed on a regular basis at the working level throughout the project organization. The Project Manager and the Project Management Office (PMO) are, jointly as well as individually, responsible for quality and completeness at all levels. In practice, project team members are charged with similar responsibilities for completing tasks that they are responsible for. In addition, the Project Manager will conduct a post implementation review to examine the project outcome and to identify pitfalls, barriers and improvement opportunities.

**Project Communication Management**

Project Communication Management includes processes required to ensure timely and appropriate generation, collection, dissemination, storage, and ultimate disposition of project information. These communication processes provide essential links among people, ideas and information that are critical to the successful completion of the project. Each process may involve effort from one or more individuals or groups of individuals based on the needs of the project and each of which generally occurs at least once in the project life cycle. Although the following processes are presented as distinct and independent mechanisms, in practice they may overlap or interact in ways not detailed here.

|  |  |  |
| --- | --- | --- |
| **Communication Types** | **Purpose** | **Process Description** |
|  |  |  |
| Project Charter | Define the scope, objectives, | The Project Charter is the single point of |
|  | project organization, and overall | reference on the project that should be read |
|  | approach of the project. | by all project team members, executives and |
|  |  | anyone new to the project. |
|  |  |  |
| Sponsorship | Legitimize project management, | A series of communications announcing and |
| Communications | scope and goals to stakeholders | reinforcing internal sponsorship of the project. |
|  | and participants of the project. | Sample mechanisms include: Presentations, |
|  |  | Announcement letter, Memos, Orientation |
|  |  | sessions, Kick-off meetings |
|  |  |  |
| Project Status Meetings | The purpose of these meetings | The Project Steering Committee will meet |
|  | is to track the progress of the | monthly to review project status and to |
|  | project. | formulate direction and decisions when |
|  |  | required. The Project Management Office |
|  |  | Team will meet weekly to review: |
|  |  |  Primary accomplishments of each working |
|  |  | committee during the week and tasks to be |
|  |  | completed. |
|  |  |  Discuss open issues and provide quick and |
|  |  | viable resolutions. |
|  |  |  Update other general information. |
|  |  |  |
| Issue Log / | Document issues that arise | The designated Project Manager will be the |
|  | throughout the project which | custodian of the Issue Log and will endeavour |
|  |  |  |

|  |  |  |
| --- | --- | --- |
| **Communication Types** | **Purpose** | **Process Description** |
|  |  |  |
| Documentation | are considered significant and | to maintain and update the status of each |
|  | may impact the project or | issue. |
|  | scope. |  |
|  |  |  |
| Functional/Process | Document important project | The Project Workbook is a single point of |
| Project Workbook | information for each Working | reference for each Working Committee. This |
|  | Committee. | information is shareable and accessible by all |
|  |  | project participants and Project Steering |
|  |  | Committee. A wiki will be used to manage this |
|  |  | process. |
|  |  |  |
| Change Requests | Identify changes to project | Track changes that affect scope, budget, |
|  | scope and submit requests to | resources, deliverables and timelines. |
|  | Project Steering Committee for |  |
|  | review and approval. |  |
|  |  |  |
| Decision Requests | Identify and analyze project | Track issues and corresponding decisions that |
|  | issues and submit requests to | impact the successful completion of the |
|  | Project Steering Committee for | project. |
|  | review and decisions. |  |
|  |  |  |

**Statement of Work (SOW)**

**Project Start-Up**

Project Start-Up includes any activities engaged in project initiation, planning and the transition from start-up to execution. Project Initiation is getting a project off to a formal start, with everyone knowing their role, agreeing what job is to be done, confirming there are good business reasons for doing it, and ensuring that any risks involved have been assessed.

**Project Initiation**

Project Initiation is aimed to confirm the scope, establish a work plan and assign resources to specific tasks. Project initiation serves to ensure stakeholders and participants have a thorough understanding about the scope of the project, standards and procedures as well as their roles and responsibilities.

**Project Planning**

Project Planning defines the project activities and work products that will be performed/produced and describes how the activities will be accomplished.

**Project Management**

Project management activities include: (1) Project Control, (2) Project Planning, (3) Status Reporting, (4) Issue Management, (5) Change Management, (6) Risk Management, (7) Quality Management and (8) Project Communication Management.

**Project Transition**

Project Transition involves activities that transform a project from the planning to the execution stage. In the project transition stage, ‘kick-off’ meetings are held to orient all stakeholders and participants.

**Site Preparation**

Site Preparation includes any activities engaged in the review and analyses of the current operational environment of the various business areas; the set-up of the technical environment; the identifying of data conversion and interface requirements; and, the documentation of forms, training materials, etc.

**Technical Infrastructure**

Technical Environment includes the set-up of hardware, infrastructure, application software as well as application and system security.

***Technical Environment***

*Technical Infrastructure involves the planning and set-up of hardware and infrastructure, the resolving of any technical and support issues; as well as the installing/testing of the technical infrastructure including hardware, system and network security, etc.*

***Application Environment***

*Application Environment includes the installing of software and the set-up of different application environments, which may include Test, Development, Training, Production as well as system constants and application security, etc.*

**Business Analysis**

Business Analysis includes any activities engaged in the specifying of detailed requirements, the review and analyses of business processes and the identifying/resolving of system and/or process issues.

**Data Conversion and Interface**

Data Conversion and Interface activities aim to identify and confirm data conversion and interface requirements; define program specifications for data conversion and interfaces; and, develop and test data conversion and interface programs.

**Documentation**

Documentation implies the designing of forms, the preparation of user guides as well as the preparing of policy and procedure manuals. This process aims to design forms and produce easy-to-use materials for subsequent system training of users and to provide guidelines for standardized business processes.

**Project Execution**

Project Execution includes any activities engaged in (i) the identification and resolution of issues; (ii) the set-up, review/refinement and confirmation of the prototype for each application module as per implementation schedule; (iii) the development and testing of system interfaces; (iv) the conversion and/or loading of data; (v) the training of end users; (vi) the execution of user acceptance testing; and, (vii) the cutover to production.

**Issue Resolution**

Issue Resolution in Project Execution focuses on identifying and resolving application-specific issues. Since Issue Management is an iterative process, issues identified in preceding phases, yet remain outstanding, must be reviewed and resolved before the execution of other implementation activities.

**Application Set-Up**

Application Set-Up involves activities engaged in (i) the set-up of a prototype for each application module as per implementation schedule; (ii) the functional testing of each prototype: (iii) the review, refinement and confirmation of the prototype; and, (iv) the tailoring of application modules in the Production environment.

***Prototype Set-Up***

*Prototype Set-Up involves the tailoring of each application module to reflect the specified user requirements and the agreed-to business processes. This process may involve several iterations of discussions with users until the system is set-up to function according to agreed upon functional requirements.*

***Functional Testing***

*Functional Testing includes (i) unit testing to confirm the functioning of the applications in a stand-alone mode; and, (ii) integration testing to confirm the functioning of the system in an integrated mode (i.e., end-to-end).*

***Prototype Confirmation***

*Prototype Confirmation includes activities engaged in reviewing the initial set-up of the prototype, refining of the prototype based upon user feedback, and confirming the final prototype with the same group of target users. Note that this is an iterative process, which involves refining the prototype until receiving final confirmation from the designated users.*

***Production Set-up***

*Production Set-Up involves the tailoring of individual application modules in the Production environment.*

**System Interfaces**

System Interfaces includes the development and testing of system interfaces to automate the conversion of data and to facilitate integration between the tru.ca web property, TRU’s ERP system (Banner) and other interfaces and services.

**User Training**

User Training provides end users with formal training of pertinent functions before performing user acceptance testing and before the scheduled ‘Go Live’ of the web property.

**Data Conversions**

Should this project require it, extensive data conversion will be required from the Legacy Web Content Management system and any new system or service selected.

**User Acceptance Testing**

User Acceptance Testing is the volume testing of the new web property in an integrated mode. Acceptance tests will be conducted to match the expected outcome pre-defined in test cases or scenarios.

**Go Live**

Go Live includes the cutover to production after User Acceptance Testing confirms the validity of each application module as per implementation schedule. Included is application support activities intended to help identify/resolve system and process issues that may emerge only after work has commenced with the production system*.*

**Project Wrap Up**

The Project Close Out process is performed once the project objectives have been met. The first step is acceptance based upon predefined success criteria. The second step is the undertaking of a post-mortem review to specify lessons learned and to identify/resolve any outstanding issues.

**Acceptance/Sign Off**

Project Acceptance is the signing off of the project based upon pre-defined acceptance criteria and the agreed upon acceptance process.