**Project Charter Template Sample**

1. **Project Background**
	1. **The Project Context: The Web Presence & Services Program**

The Web Function & Design Project is one component of a larger Web Presence & Services Program. Charged by Chancellor Blumenthal in October 2008, the Web Presence & Services Program seeks to address challenges associated with UC Santa Cruz’s online presence through a series of interconnected projects and governance activities.

Key program goals include:

* + Establishing ongoing, campus-level shared governance to set direction, recommend solutions, and prioritize resource allocation
	+ Articulating a campus strategy for how the web will be used as a communications asset
	+ Defining and supporting roles, responsibilities, and processes for creating and publishing consistent content to the web
	+ Implementing a robust toolset including a web content management system to support top-tier campus web presence, and provide departments and programs with resources to meet their publishing needs
	+ Clarifying and enhancing web services provided by ITS, Public Affairs, local staff, and vendors
	+ Updating the function and design of UCSC’s web presence to support our communication objectives through the creation and distribution of a suite of design templates and content guidelines
1. **Problem/Opportunity Description**

Over time, a distributed approach to supporting web presence has evolved at UC Santa Cruz – campus central administration, divisions, units, and programs tend to support their web publishing needs independently, using a diverse array of tools, content, and services. Not surprisingly, this unstructured approach causes a lack of content consistency, as well as substantial disparity between the tools and services available from one area of campus to the next.

The visual design across UCSC sites differs dramatically, leaving online visitors without common tools for navigation or consistent organization of information. This can be disorienting to site visitors and counterproductive to academic and administrative units who rely on the web to convey information and foster productive interactions with key audiences.

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UCSC’s Strategic Academic Plan released in February 2008 states that the institution “strives to serve California as a top-ranked research university and the leading institution for the education of students.” This goal implies the need to communicate extensively with current and prospective students, faculty, and staff. It requires a unified, effective web presence, complete with visual designs and information architecture that support a fluid and rewarding end-user experience.

UC Santa Cruz Chancellor George Blumenthal issued a charge to implement the Web Presence & Services Program in October 2008. Among other directives, the charge included, “Designing an updated, effective, and consistent look and feel for UCSC’s web presence.”

**1.3 Benefits**

As funding decreases, UC Santa Cruz’s ability to pursue its core mission and strategies will depend increasingly on recruiting and retaining the best and brightest faculty, staff, and students. In an increasingly digital world, the Internet is often the first introduction and most critical communication tool available in these efforts.

In addition, the web is the central medium supporting efforts to raise external funding. Raising donations and securing grants take place online – processes that are easily derailed by a disjointed, out-dated, or frustrating web experience.

A modern attractive design, consistent branding, and intuitive organization of information will support the university in its efforts to position itself as a leading research and educational institution, and prepare for a major capital campaign.

**1.4 Goal**

The goal of this project is to improve UCSC’s official web presence by providing an updated, compelling visual design and information architecture for the central university web presence.

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 UCSC; and a web experience on par with other leading higher education institutions.

**1.5 Stakeholders and Clients**

1. ***Executive Sponsors***

The Web Presence & Services Program is co-sponsored by the divisions of University Relations and Information Technology Services. This partnership between the outward-facing presentation of the university and the underlying technologies that support web presence is a foundational aspect of each component of the program, making these two divisions key stakeholders in this project.

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1. ***Target Audiences***

UCSC websites are used primarily by four key audience groups – prospective students (both graduate and undergraduate), admitted students, faculty and staff, and alumni. Additional audiences include parents, members of the Santa Cruz community, news media, and online visitors from across the educational, research, and public service communities

1. ***University Leadership***

The Chancellor, Executive Vice Chancellor, and principal officers of each division of the campus are primary stakeholders for this project. Key stakeholders from the Academic Senate include the Committee on Admissions and Financial Aid (CAFA) and the Committee on Computing and Telecommunications (CCT). Other stakeholders include the Provost Operations Committee (PROPS), the Council of Provosts, and the Dean’s Advisory Council.

1. ***Web Governance***

Campus web governance bodies are also key stakeholders in this work, including the Web Council, the Web Steering Committee, and the Web Presence & Services Program Leadership Team.

1. ***Public Affairs Office***

The Public Affairs Office promotes a broad understanding of and appreciation for the academic programs and public service projects of UCSC by coordinating news media coverage for the campus, producing printed and online publications and marketing documents, and developing communication strategies for UC Santa Cruz. The primacy of the marketing objectives in the Web Function & Design Project makes this office a key stakeholder.

1. ***Campus Constituencies***

Nearly all campus constituencies are engaged in delivering information and services via the web in support of the core university mission.

1. ***Related Project Teams***

Cross project interdependencies with other Web Presence & Services Program projects including the Web Content Management Project and the Web Services Definition project make these project teams important stakeholders.

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1. **Project Scope**
	1. **Objectives**

The primary objectives of this project are to:

* + Engage a design consultant to assist the campus analyzing current state, identifying and implementing critical improvements, and developing updated visual designs
	+ Update and improve the campus’s general information architecture (how pages are organized and navigated)
	+ Develop a modern, effective visual design (look and feel) for central UC Santa Cruz web sites, and a suite of design templates for use by campus units
	+ Establish standards for design, content and development that will be distributed to campus organizations
1. **Deliverables**

This section describes high level deliverables of this project, with the individual work products that will produce them.

**Objective 1** – Engage a Design Consultant

|  |  |
| --- | --- |
| **Project Deliverable** | **Work Products/Description** |
|  |  |
| Scope of Work Document (SOW) | Define the scope and deliverables for a design consultant to |
|  | engage in: End-user functionality analysis, focus group |
|  | interviews, information architecture design, and creation of |
|  | visual design templates. |
|  |  |
| Consultant Agreement | In coordination with Procurement & Business Services, |
|  | execute a Request for Proposals and negotiate an agreement |
|  | for services with a qualified design consultant. |
|  |  |

**Objective 2** – Conduct Current State Analysis and Requirements Gathering

|  |  |
| --- | --- |
| **Project Deliverable** | **Work Products/Description** |
|  |  |
| Current State Analysis | Execute end-user functionality analysis, review of current web |
|  | sites, focus group interviews, information architecture design, |
|  | visual design templates to evaluate and analyze the current |
|  | state of UCSCʼs web presence. |
|  |  |
| 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. |
|  |  |

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**Objective 3** – Update and Improve Information Architecture

|  |  |
| --- | --- |
| **Project Deliverable** | **Work Products/Description** |
|  |  |
| Information architecture | Based upon current state analysis, project scope, and input |
| recommendation for top tier | from key stakeholder groups, develop recommendations for |
| university sites | information architecture for top tier university web sites. |
|  |  |
| Information architecture toolset | Produce tool set for local web site planning and extension of |
|  | top tier information architecture to lower tier structures. |
|  |  |

**Objective 4** – Develop a modern, effective visual design

|  |  |
| --- | --- |
| **Project Deliverable** | **Work Products/Description** |
|  |  |
| Updated visual design for top tier | Obtain design requirements from key constituencies through |
| sites | focus groups. Draft wireframes, design mock-ups, and final |
|  | draft templates for top tier campus sites. |
|  |  |
| Suite of design templates for | Obtain design requirements from key constituencies through |
| campus divisions and departments | focus groups. Draft wireframes, design mock-ups, and final |
|  | draft templates for lower tier campus sites. |
|  |  |

**Objective 5** – Establish Standards for Design, Content and Development

|  |  |
| --- | --- |
| **Project Deliverable** | **Work Products/Description** |
|  |  |
| Standards and guidelines for | Develop core standards for branding, navigation, accessibility, |
| design, content, and development | and compliance with relevant policies and regulations |
|  |  |
| Implementation plan for adoption | Develop and document implementation plan |
| of design standards. |  |
|  |  |
| Recommendations for next steps | Identify higher priority policies that are not in-scope to be |
| for policy/standards development | handed off to governance and web service management. |
|  |  |

**2.3 Out of Scope**

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

* Selection, procurement, and implementation of a web content management system
* Any coding, scripting, application development, or technical development within the web content management system
* Development of content (text, images, video) beyond basic information architecture and template design
* Implementation of accessibility or regulatory compliance measures beyond identification of campus standards and basic information architecture and template design

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1. **Project Plan**
	1. **Approach and Methodology**

The following strategies and activities will be used to assure successful delivery of project deliverables:

* Utilize the Web Program Leadership Team and office of the Executive Vice Chancellor as points of accountability for key decisions, including approval of information architecture and design templates.
* Engage with the UCSC Web Council, campus principal officers, and representatives from the Academic Senate to inform strategies and key decisions.
* Integrate and coordinate activities and information with separate projects within the Web Presence & Services Program to identify and fulfill cross-dependencies.
* Partner with Procurement & Business Contracts to craft a scope of work, manage a request for proposal (RFP), and select and contract with a design consultant.
* Engage a design consultant to

o facilitate campus level conversations o conduct end-user analysis

o draft and recommend information architecture o draft and recommend visual design(s)

* 1. execute templates to meet design standards
* Engage campus constituencies for requirements gathering. Examples include: Web Council/Steering, CAB/SEC, CAFA/CCT, Academic Department Managers, Assistant Deans/CAS, Council of Provosts, DL Council, Digital Arts/New Media faculty and students, student groups, and high school students and parents.
* Engage a subset of constituents to provide feedback on design and information architecture recommendations. This group would provide feedback only and would not constitute a decision making body.
* Engage a team of staff, faculty, and students, working under the guidance of the Web Steering Committee, to draft design standards and implementation plan. Obtain final approval of the UCSC Web Council, campus principal officers, and representatives from the Academic Senate.
* Maintain a primary focus on critical university strategies and priorities.

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**3.2 Project Timeline**

The following table presents a high level timeline based on the deliverables for this project. This information will be refined and updated in coordination with the design consultant.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **ID** | **Task Name** | **Start** | **Finish** | **Duration** |
|  |  |  |  |  |
| 1 | Project Launch | 1/20/09 |  |  |
|  |  |  |  |  |
| 2 | Project Scope Planning | 1/20/09 | 2/23/09 | 4 weeks |
|  |  |  |  |  |
| 3 | Design Consultant Scope of Work | 3/2/09 | 4/3/09 | 5 weeks |
|  |  |  |  |  |
| 4 | Consultant Selection Process | 4/3/09 | 5/15/09 | 6 weeks |
|  |  |  |  |  |
| 5 | Current State Analysis | 5/18/09 | 6/15/09 | 4 weeks |
|  |  |  |  |  |
| 6 | Requirements Gathering | 5/22/09 | 7/10/09 | 7 weeks |
|  |  |  |  |  |
| 7. | Information Architecture Design | 6/1/09 | 8/14/09 | 11 weeks |
|  |  |  |  |  |
| 8. | Top Tier Template Design | 7/13/09 | 8/28/09 | 7 weeks |
|  |  |  |  |  |
| 9. | Alternate Template Design | 7/2/09 | 9/4/09 | 7 weeks |
|  |  |  |  |  |
| 10. | Draft Standards | 7/20/09 | 11/6/09 | 16 weeks |
|  |  |  |  |  |
| 11. | Develop Information Architecture Tool Kit | 9/1/09 | 10/30/09 | 9 weeks |
|  |  |  |  |  |
| 12. | Develop Standards Implementation Plan | 9/28/09 | 11/20/09 | 8 weeks |
|  |  |  |  |  |
| 13. | Final Items / Schedule Adjustment | 11/20/09 | 12/18 | 5 weeks |
|  |  |  |  |  |
| 14. | Project Complete – Celebrate |  | 12/18/09 |  |
|  |  |  |  |  |

**3.3 Success Criteria**

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

* Stakeholders and clients are engaged throughout the project, and their requirements, preferences and opinions are documented and incorporated in design processes.
* Dependencies with other web presence projects are identified and coordinated and associated risks are mitigated.
* Design consultant is successfully managed to produce deliverables within scope, budget, and project schedule.
* Information architecture designs are created, approved by Web Program Leadership Team, and incorporated into design templates and production web environments (as applicable).
* Designs and templates are created, approved by Web Program Leadership Team, and handed off to university staff for incorporation into production web environments.
* An initial 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.

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* + Implementation plans for adoption of standards are documented and approved by governance.
	+ Tool sets for development of local information architecture and web design are documented and delivered to university web service staff.
	+ Feedback from campus constituents on design and information architecture is positive.
1. **Issues and Policy Implications**
2. ***Critical Partnerships***

The success of this project will depend on critical partnerships, including:

* Leadership Support: The Chancellor’s Office, University Relations, and ITS
* Project strategies and key decisions: UCSC Web Council, campus principal officers, Academic Senate representatives.
* Development of standards and guidelines: Web Steering Committee, key stakeholders, Public Information Office.
* Consultant selection and management: Procurement & Business Contracts, Web Program Leadership Team
* Cross-project dependencies: Web Presence & Services Program, Web Content Management System Project, Web Services Definition Project

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**3.5 Risk Management Plan**

|  |  |  |  |
| --- | --- | --- | --- |
| **Risk Factor** | **Probability** | **Impact** | **Risk Management Action** |
|  | **(H-M-L)** | **(H-M-L)** |  |
|  |  |  |  |
| Funding and resources for the | High | High | Integration of budget requests and |
| overall Web Program will impact |  |  | participation by sponsor and project |
| the ability to implement new IA |  |  | manager with Web Program |
| and designs. If resources do not |  |  | Leadership Team will provide as much |
| materialize, existing staff may |  |  | advance notice as possible. Project |
| not be sufficient to support the |  |  | team will remain agile, to adjust |
| objectives as described. |  |  | deliverables and implementation plan if |
|  |  |  | necessary to match program |
|  |  |  | objectives. |
|  |  |  |  |
| The proposed time frame is | High | High | Rigorous project management, |
| aggressive, and further |  |  | prioritization of time sensitive |
| complicated by budget and |  |  | deliverables, and selection of a |
| schedule constraints for project |  |  | competent, experienced design |
| participants. |  |  | consultant. Develop clear objectives, |
|  |  |  | agendas, and tools/processes for |
|  |  |  | managing group sessions. |
|  |  |  |  |
| Aesthetic subjectivity and | High | High | Input will be solicited from numerous |
| competing interests introduce |  |  | sources, but key decisions will be |
| challenges in obtaining |  |  | made by a small, defined group. |
| acceptance of deliverables. |  |  | Engage key constituencies openly, |
|  |  |  | understand and document |
|  |  |  | requirements, and communicate |
|  |  |  | expectations and decision authority |
|  |  |  | clearly. |
|  |  |  |  |
| Funding availability is | Med | High | Identify resources in advance and lock |
| inadequate to engage desired |  |  | funding as soon as possible. Clearly |
| consultant, or limits the scope of |  |  | define consultant scope of work so that |
| the consultantʼs work. |  |  | proposals are accurately priced. |
|  |  |  | Prioritize deliverables to allow |
|  |  |  | constriction of scope if necessary. |
|  |  |  |  |
| Due to the highly distributed | High | Med | Senior campus leaders publicly support |
| nature of web management |  |  | the Web Program and provide a clear |
| across campus, there is a high |  |  | directive that can be used to set |
| risk of resistance to shared |  |  | expectations. Emphasize the balance |
| visual design and standards by |  |  | between local distinctiveness and the |
| local developers and content |  |  | need to create a consistent end-user |
| managers. |  |  | experience. |
|  |  |  |  |
| Top tier improvements are | High | Low | Creation of tools and processes for |
| diminished by lack of progress |  |  | local information architecture. |
| in lower tier sites. Constituent |  |  | Coordination with WCMS and Web |
| groups emphasize the need for |  |  | Services Definition projects to ensure |
| tools and training for local |  |  | resources and incentives are available |
| information architecture design. |  |  | to local web site managers. |
|  |  |  |  |
| Content creation is not in scope | High | High | The Web Program budget requests |
| of this project, yet achieving an |  |  | new staffing intended to support this |
| improved web presence will |  |  | function. If approved, new resources |
| require substantial purging of |  |  | will mitigate this risk. If denied, |
| old content, creation of new |  |  | additional mitigations may include |
| content, and thorough editing of |  |  | changes to the scope of work for the |
| existing sites. This work will be |  |  | design consultant (with commensurate |
| managed by University staff, |  |  | increase in project budget), or re- |
| who already manage full time |  |  | prioritization of existing staff workload. |
| workloads |  |  |  |
|  |  |  |  |

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**4 Project Organization and Staffing**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **ROLE** | **NAMES & CONTACT INFORMATION** |  | **RESPONSIBILITIES** | **TIME** |
|  |  |  |  |  |  |
|  | Executive Sponsors | Vice Chancellor Donna Murphy |  | Ultimate authority and | As needed |
|  |  | Vice Chancellor Mary Doyle |  | responsibility for the program | throughout |
|  |  |  | and projects. Approve | project |
|  |  |  |  |
|  |  |  |  | changes to scope, identify |  |  |
|  |  |  |  | and secure funding, approve |  |  |
|  |  |  |  | deliverables |  |  |
|  |  |  |  |  |  |
|  | Project Sponsor | Barry Shiller |  | Makes business decisions for | As needed |
|  |  |  |  | the project, participates in key | throughout |
|  |  |  |  | activities, makes resources | project |
|  |  |  |  | available, approves work |  |  |
|  |  |  |  | products, addresses issues |  |  |
|  |  |  |  | and approves change |  |  |
|  |  |  |  | requests |  |  |
|  |  |  |  |  |  |
|  | Project Manager | David Turner |  | Reports to and receives | 4-8 hours per |
|  |  |  |  | direction from sponsors. | week |
|  |  |  |  | Manages, reviews, and |  |  |
|  |  |  |  | prioritizes project work plans, |  |  |
|  |  |  |  | provides status and progress |  |  |
|  |  |  |  | reviews, manages resources, |  |  |
|  |  |  |  | escalates issues and |  |  |
|  |  |  |  | mitigates risks, recommends |  |  |
|  |  |  |  | changes, motivates and |  |  |
|  |  |  |  | coaches team members, and |  |  |
|  |  |  |  | reviews and approves |  |  |
|  |  |  |  | deliverables |  |  |
|  |  |  |  |  |  |
|  | Project Assistant | Teresa Silva |  | Scheduling, notes, support, | 2-6 hours per |
|  |  |  |  | and documentation | week |
|  |  |  |  |  |  |
|  | Design Decisions | Web Program Leadership Team (Donna |  | Reviews and approves draft | As needed |
|  |  | Murphy, Mary Doyle, Barry Shiller, Mark |  | and final information | throughout |
|  |  | Cianca, Jim Burns, David Turner), with |  | architecture and template | project |
|  |  | additional participants as needed |  | designs. |  |  |
|  |  |  |  |  |  |
|  | Information | Jim Burns and Rob Knight |  | Represent information | 0-4 hours per |
|  | Architecture Lead |  |  | architecture perspective in | week |
|  |  |  |  | project team meetings and |  |  |
|  |  |  |  | interactions with design |  |  |
|  |  |  |  | consultant. Contribute to key |  |  |
|  |  |  |  | information architecture |  |  |
|  |  |  |  | discussions and deliverables. |  |  |
|  |  |  |  | Review, contribute to, and |  |  |
|  |  |  |  | comment on information |  |  |
|  |  |  |  | architecture work products. |  |  |
|  |  |  |  |  |  |
|  | Design Lead | Linda Knudson |  | Represent design perspective | 0-4 hours per |
|  |  |  |  | in project team meetings and | week |
|  |  |  |  | interactions with design |  |  |
|  |  |  |  | consultant. Contribute to key |  |  |
|  |  |  |  | design discussions and |  |  |
|  |  |  |  | deliverables. Review, |  |  |
|  |  |  |  | contribute to, and comment |  |  |
|  |  |  |  | on design work products. |  |  |
|  |  |  |  |  |  |
|  | Content Leads | Mary Ann Dewey and Gwen Mickelson |  | Represent content | 0-4 hours per |
|  |  |  |  |  |  |
|  |  |  |  |  |  | 10 |
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|  |  |  |  |
| --- | --- | --- | --- |
|  |  | perspective in project team | week |
|  |  | meetings and interactions |  |
|  |  | with design consultant. |  |
|  |  | Contribute to key content |  |
|  |  | discussions and deliverables. |  |
|  |  | Review, contribute to, and |  |
|  |  | comment on content work |  |
|  |  | products. |  |
|  |  |  |  |
| Information | Leslie Geary | Represent information | 0-4 hours per |
| Technology Lead |  | technology perspective in | week |
|  |  | project team meetings and |  |
|  |  | interactions with design |  |
|  |  | consultant. Contribute to key |  |
|  |  | information technology |  |
|  |  | discussions and deliverables. |  |
|  |  | Review, contribute to, and |  |
|  |  | comment on information |  |
|  |  | technology work products. |  |
|  |  |  |  |
| Standards Design | Tentative: Shawn Seley, Scotty Brookie, Rob | In coordination with the Web | Up to 4 hours |
| Team | Knight, Angela Thalls, Brigitte Parot | Steering Committee, this | per week, July |
|  |  | team will develop the initial | through |
|  |  | set of campus web standards | November |
|  |  |  |  |
| Advisors and | Academic Department Managers Group | These groups will be invited | Group sessions |
| Resources | Assistant Deans / CAS Group | to provide input and | to be scheduled |
|  | requirements for campus |  |
|  | Committee on Admissions and Financial Aid |  |
|  | level information architecture |  |
|  | Committee on Computing and |  |
|  | and visual design at key |  |
|  | Telecommunications | points during the project. |  |
|  | Council of Provosts |  |  |
|  | Deans Advisory Council |  |  |
|  | Digital Arts / New Media Faculty/Students |  |  |
|  | Divisional Liaison Council |  |  |
|  | Provosts Operations Group (PROPS) |  |  |
|  | Senate Executive Committee |  |  |
|  | Current and prospective students and |  |  |
|  | parents |  |  |
|  | UCSC Web Council |  |  |
|  | Web Steering Committee |  |  |
|  | Web Coords Group |  |  |
|  |  |  |  |

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*Web Presence & Services Program*

*University of California, Santa Cruz*

*1156 High Street*

*Santa Cruz, CA 95064*

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