# THE UNIVERSITY OF TENNESSEE CHATTANOOGA

Drupal Migration Project Charter

September 14, 2018

# Revision History

| Version | Revision Notes | Author(s) | Date |
|---|---|---|---|
| 1.0 | Initial Version | Chèrie Whipple | 9/14/2018 |
| 2.0 | Draft Review by CIO and Vice Chancellor Communications and Marketing | Chèrie Whipple | 9/18/2018 |
| | | | |
| | | | |
| | | | |
| | | | |

# Project Identification

| Client Name: | University of Tennessee at Chattanooga | | |
|---|---|---|---|
| Project ID/Name: | University Website Drupal Migration | | |
| Charter Date: | 9/14/2018 | Project Start: | 9/10/2018 |

# Project Overview / History

The University of Tennessee at Chattanooga public website is managed through the Office of Communications and Marketing under the leadership of George Heddleston. Editorial work for individual pages has been managed and provided by over 300 editors across the campus representing all academic and administrative groups. Currently, there are over 5,000 pages that make up the UTC website. The website has been developed in OU Campus by OmniUpdate and Wordpress. The last redesign and migration from Adobe Contribute took place in 2013.

The website reflects a broad perspective: from pages focused on the student experience--such as admissions, athletics, and events--to repository-like pages housing departmental forms, processes, instructions, and links that may only be of interest or use to the members within a specific department.

The UTC Chancellor and Executive Leadership Team have initiated a formal project to move the campus website in a new direction. A project is defined as a series of tasks, with a recognized beginning and end point, that produces a deliverable or expected result. All projects end. If the project is correctly scoped, monitored, and implemented, the deliverables will arrive on time, on or under budget, and with a modicum of celebration by all involved. The remainder of this charter outlines the understanding of the project objectives and communicates the opportunities and challenges recognized as a part of any responsible project plan.

# Opportunity/ Impact

Moving from OU Campus to Drupal will provide new functionality to the UTC web developers to create a more effective user experience. Students, faculty, and staff will benefit from enhanced communication and ease of searching for needed information. The university will benefit by providing a modern, engaging website purposefully focused on student recruitment, alumni engagement, and community involvement. Migrating from OU Campus to Drupal, UTC is partnering with Acquia and will use the Acquia cloud hosting platform. Acquia is a leader in the content management system market (CMS) according to Gartner Magic Quadrant research.

Currently, with over 300 editors, the 5,000+ webpages lack consistency in function and format. A common complaint about the website from campus users is that it is hard to find anything without using a search function. Moreover, some content meant for an internal audience only is publicly exposed (copyrighted material, employee-focused content, confusing material). So one primary focus of the project will be separating public-facing content from content intended for internal use by the campus community.

# Objectives

- Migrate the current public content management system from OU Campus to Drupal
- Deliver a university website reflecting contemporary higher education website standards
- Create a website that markets the university positively and attracts prospective students, donors, and community constituents

- Foster a sustainable and accountable culture of maintenance of the website through improved, effective content management

## Project Scope Statement

UTC will migrate its website from OU Campus through OmniUpdate to the Drupal platform hosted by Acquia Cloud through the Carahsoft contract to be completed by August 2019. Project success will be measured by achievement of the objectives outlined previously.

## High-Level Scope Expectations

### Scope Inclusions
- Maintenance of public-facing pages to be updated prior to go-live
- Campus readiness for a website migration
- Incorporation of any project plan proposed by vendor into UTC Drupal Migration project plan

### Scope Exclusions
- Training of on-campus editors following go-live
- Determinations for non-public facing content options

## Project Timeline

The migration is anticipated to be completed by August of 2019. Factors affecting the delivery by that date are outlined below. A high-level project plan, in Microsoft Project, has been developed as part of the Project Planning Phase.

## Project Cost Summary

The budget for this migration has not been determined. The OmniUpdate annual maintenance for $12,000 is in payment progress by UTC IT for the period 12/1/2018 through 11/30/2019. Acquia Professional Services group has provided a preliminary proposal to manage the migration with two options ranging in price from $80,395 to $142,095.

## Assumptions:

- Departments requiring website updates will attend meetings, provide content, review pages, and sign off as per agreed-to schedule.
- Executive Leadership and Deans will promote and support the recommended changes (reduction in editor count).
- Time will be dedicated by the Core Team in Communications and Marketing to maintain the agreed-to project plan.
- The timeline will be supported by Executive Leadership and the Deans.

## Constraints

The three most significant project constraints – time, cost, and scope – are also known as the triple constraint in project management. The time--i.e., schedule--lays out the timeline for a project according to which components will be delivered, in which order, and with significant milestones illustrated along the way. A project's scope involves the specific goals, deliverables and tasks that define the boundaries of the project. Finally, there is a cost element in every project, either dollars expended for labor, materials, or services needed to get the job done. With any change in one of the constraints, another will be affected. For example, moving deadlines typically adds to the cost of a project and is usually the result of a change in scope. For the Drupal Migration Project, the constraints include:

- Migration must be completed in 11 months (go-live anticipated August 1, 2019).
- No final dedicated budget has been identified although early financial budgeting has been supplied..
- Only two (FTE) trained developers will be available for the project with approximately 5,000 current web pages to migrate.
- The scope is only for Drupal migration of material that results in a site with a marketing focus for the public face of the university.  Decisions will need to be made for all content that is not to remain public-facing.

# Project High-Level Risks

All projects, no matter how small, have associated risks.  Risks typically fall into three impact categories: scope creep, cost overruns, or time extension.  All risks have a cost; so mitigation strategies and clear communication of associated risks at the start of a project are crucial to project long-term success.  For the Drupal Migration project, the following risks have been identified:

- Attrition in Development team will negatively impact timeline.
- Absences, vacations, holidays will impact timeline.
- Drupal skillset is still new to team and expertise is not deep in organization, issues which can impact timeline and may affect cost if additional resources are required.
- Current maintenance on OU Campus impacts the team's time availability for focused Drupal development, which will negatively impact timeline.
- Campus competing priorities across and within initiatives may contribute to scope creep and timeline.
- Lack of campus-wide readiness for migration could affect scope and timeline.
- Cost of vendor professional services viewed as too high (cost over-run) could lead to rejection or reduction in professional services but would significantly speed up timeline.
- Potential lack of testers/editors identified to support comprehensive beta testing plan could lead to reduced QA testing and affect final quality of deliverables.
- Migration environment setup/installation is complex and new to Infrastructure team, which could be a barrier to timely completion.
- Part-time leadership of Project Director to devote needed time to critical steps in moving migration forward could affect timeline and increase opportunity for scope creep.

Please see the Project Risk Register for more detail on each risk and mitigation strategy (separate project document accompanying this charter).

# Project Communications

A project management communication plan defines how critical information will be organized and delivered through the length of a project.  The person or group responsible for creating and distributing the message is identified.  The frequency and format are also determined.  Communication is critical to maintaining a good relationship with stakeholders, creating buy-in for the project, and working transparently so there is shared understanding and responsibility for the success of the project.

The Drupal Migration Communications Plan is an Excel document that breaks down the written documentation provided during the project as well as the meetings and deliverables.  A separate section details the messages and formal communications focused on the external audience.  In this case, external includes university leadership and the campus community, those outside the central core delivery team.

A project blog is also in development to provide timely communication to the campus.  The blog is a dedicated webpage to provide updates on the project timeline to reference what's ahead and serve as an

archive for all broadcast communications to campus for the project. The primary purpose of the blog is to provide transparency for the project and communicate progress and celebrate accomplishments.

Please see the Project Communications Plan for more detailed communication activity and information (separate project document accompanying this charter).

## Project Team

Communications and Marketing has personnel and processes to work with campus constituents to review, organize, and improve web content, taking the creative load off colleges, departments, and business units. Communications and Marketing also has dedicated, trained, and supported student web editors to assist with content maintenance, although there is budgeting to add more help if a few additional students can be identied who have correct, basic, project IT training, and enthusiasm.

For the Drupal Migration project, key UTC personnel will be called on to participate in various roles.

| Role | Name | Responsible for… |
|---|---|---|
| Project Sponsor | George Heddleston | Overall vision for project, purchasing approver, communicating progress to executive leadership. |
| Project Director | Chèrie Whipple | Managing project resources to deliver project within scope, on time, and within budget; communicating progress to the Project Sponsor. |
| Core Project Team | Chris Gilligan<br>Weston Gentry<br>Michael Miller<br>Gina Swafford<br>Sarah Joyner | Actual development tasks, technical resources to work with vendors, editorial copy and assistance, communicating progress to the Project Director. |
| Infrastructure Team | Stephen Leather<br>Steven Shelton | Providing technical expertise and deliverables associated with actual migration tasks, working with vendors as requested, communicating progress to the Project Director. |
| Web Editors | Web Editors and Liaisons<br>○ Office of the Chancellor<br>○ Communication and Marketing<br>○ Enrollment Management and Student Success<br>○ Student Affairs<br>○ Academic Affairs<br>○ Intercollegiate Athletics<br>○ Finance and Administration<br>○ Office of Development and Alumni Affairs<br>○ Research and Graduate School | Providing content requirements for their specific website pages, reviewing mock-ups and editorial drafts, attending workflow meetings, testing when requested in a timely manner, giving feedback, and final sign-off at completion. |

| Role | Name | Responsible for… |
|---|---|---|
|  | o Colleges<br>o Information Technology<br>o Library |  |

## Project Stakeholder Register

A stakeholder is any person, group, or organization that may be affected or have an interest in the project or its outcome.  Stakeholders can play an active role in the project or simply need to be aware of the project as it may impact other initiatives tangential to the project.

The RACI matrix is a standard methodology for information dissemination and decision making that will map responsibility by stakeholders demonstrating their role in the completion of a project. The four roles stakeholders might assume in any project include the following:

- **Responsible**: People who do the work. They must complete the task or objective or make the decision. Several stakeholders can be jointly *Responsible*.
- **Accountable**: The "owner" of the work. He or she must sign off or approve when the task, objective, or decision is complete. Success requires there is only one person *Accountable*, which means that "the buck stops there."
- **Consulted**: Those who need to provide input before the work can be done and signed-off on. These people are "in the loop" and active participants.
- **Informed**: Those who need to be kept "in the picture." They need updates on progress or decisions, but they do not need to be formally consulted, nor do they contribute directly to the outcome of the project.

Please see Stakeholder Register below with their RACI determination.

| Name | Title/Dept | Role | Responsible | Accountable | Consulted | Informed |
|---|---|---|---|---|---|---|
| Dr. Steven Angle | Chancellor | Executive Sponsor |  |  |  | X |
|  | Executive Leadership Team |  |  |  |  | X |
| George Heddleston | Vice Chancellor | Project Sponsor |  | X |  |  |
| Chris Gilligan | Lead Web Developer, Comm & Marketing | Core Team Member | X |  |  |  |
| Weston Gentry | Web Developer, Comm & Marketing | Core Team Member | X |  |  |  |
| Michael Miller | Web Assistant, Comm & Marketing | Core Team Member | X |  |  |  |

| Name | Title/Dept | Role | Responsible | Accountable | Consulted | Informed |
|---|---|---|---|---|---|---|
| Gina Stafford | Assistant Vice Chancellor, Comm & Marketing | Core Team Member | X | | | |
| Sarah Joyner | Staff Writer | Core Team Member | X | | | |
| | Communication & Marketing Staff | | | | | X |
| Dr. Dennis Gendron | CIO, Information Technology | Project Director's Mgr. | | | | X |
| Chèrie Whipple | Director, Enterprise Applications, Information Technology | Project Director and Core Team Leader | X | | | |
| Stephen Leather | | Infrastructure Team | X | | | |
| Steven Shelton | | Infrastructure Team | X | | | |
| | Information Technology Staff | | | | | X |
| | IT Advisory Council (ITAC) | | | | | X |
| | Provost, Deans, Academic Affairs | | | | X | |
| | Administrative Dept. Leadership and Managers | | | | X | |
| | Campus (students, faculty, staff, alumni) | | | | | X |

## Project Charter Stakeholders Signoff

| Approvals | Name | Signature | Date |
|---|---|---|---|
| Prepared By: | Chèrie Whipple | | 9/14/18 |
| Project Sponsor: | George Heddleston | | |
| Chief Information Officer: | Dennis Gendron | | |