Web Presence and Services Program Charter
Information Technology Services, University Relations

November 2008
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Change Record

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Reviewers

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<td>Mark Cianca</td>
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<td>Ann Berry Kline</td>
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<tr>
<td>Barry Shiller</td>
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<td>Jim Burns</td>
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<td>Lisa Gardner</td>
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<td>Pat LeCuyer</td>
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<td>Mary Doyle, VC Information Technology</td>
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Charter Acceptance

Donna Murphy, Vice Chancellor University Relations

Mary Doyle, Vice Chancellor Information Technology

UC Santa Cruz  Web Presence and Services Program Charter
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1 Program Charge Letter

October 7, 2008

Vice Chancellor Doyle
Vice Chancellor Murphy

SUBJECT: Charge to Implement Web Presence & Services Program

To ensure that the campus reflects and promotes its scholarly distinctions and programs effectively, I ask you to identify and recommend processes, oversight, investments and actions to improve the campus’s web presence.

My vision for UC Santa Cruz and the Strategic Academic Plan released in February 2008 state that our campus “strives to serve California as a top-ranked research university and the leading institution for the education of students.” The ability of the campus to present our qualities and achievements through a robust web presence is a critical component in pursuing this vision.

I ask you to charge a Web Presence and Services Program, jointly sponsored by the divisions of University Relations and Information Technology Services, to address a range of web presence factors, including updated content, design, service offerings, and supporting technologies. High-visibility components of this program should include:

- Creating campus level web governance to set strategy, policies, and guidelines for creating and updating content
- Articulating a campus strategy for how the web will be used as a communications asset
- Designing an updated, effective, and consistent look and feel for UCSC’s web presence
- Selecting and installing a centrally-supported, easy to use web content management tool
- Defining accessible, user-friendly web services, and related roles and responsibilities necessary to support campus web presence
- Defining design standards, security strategies, and compliance activities required for sites defined as official UCSC web sites

Please design an inclusive program that seeks input and participation from constituencies across campus, including the Academic Senate. This will be a significant step forward in creating and supporting a web presence that shows our best face to the public.

Improvements to our web presence will require resources and assistance from many sources across the campus. Please convey to the campus that I request cooperation in making their time and creativity available.

Thank you,
George Blumenthal
Chancellor

cc: Executive Vice Chancellor
Deans
Vice Chancellors
Vice Provosts
University Librarian
ACP Moreno
ACCS Sahni
AVC Shiller
2 Program Background

2.1 Problem/Opportunity Description

Over time, UC Santa Cruz has allowed a distributed approach to supporting web presence to evolve – campus central administration, divisions, units, and programs each support their web publishing needs independently, using a diverse array of tools, content, and services.

Not surprisingly, this unstructured approach has resulted in a lack of content consistency, as well as substantial disparity between the tools and services available from one area of campus to the next. While there is a published standard template, standard deployment is not enforced.

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.

With the information technology transformation that created the Division of Information Technology Services, a variety of campus web service providers were centralized for the first time into the unit of Applications Solutions. This process primarily brought together support for a number of individualized “boutique” toolsets, with the long-term intention of actively designing the services and toolsets necessary to support the broad and varied web needs of the campus.

Feedback indicates a general lack of satisfaction with the options and resources available for web support. Similarly, the guidelines produced and maintained by the Public Information Office have never been mandated (nor fully resourced) at the campus level, and as such have not been marketed, actively distributed, or enforced.

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.” These goals imply the need to communicate extensively with current and prospective students, faculty, and staff. This will require a unified, effective web presence, complete with robust tools, responsive services and relevant, timely content.

2.2 Goals

The goal of the Web Presence & Services Program is to deliver and support an enhanced web presence for UCSC. This simple statement has broad implications, which will be addressed through a number of explicit steps necessary to improve the current state, including:
• 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

2.3 Serving the Academic Mission and Vision

This work is designed to further the academic mission of the University, and support the Chancellor's vision to enhance UCSC's role as a “top-ranked research university and the leading institution for the education of students.”

With this in mind, critical points of engagement will be scheduled with representatives across the academic community to ensure that the direction and outcomes of the program are properly crafted. These efforts include:

- Regular solicitation of feedback and counsel from the Deans Council, the Provost Council, and Academic Senate Committees
- A broad spectrum of academic perspectives invited to sit on the primary governance body (Web Council), including representatives from: Academic Senate faculty, Research, Academic Affairs, Undergraduate Education, University Library, and the Assistant Deans
- Careful vetting and solicitation of input from academic constituencies for the scope and deliverables of each project within the program

These activities will each serve multiple purposes:

- To provide an overview of the principles, direction, and expectations of the program and its individual projects
- To seek guidance and input on how to adjust these efforts to better serve the academic mission
- To offer opportunities for greater participation and leadership from academic constituencies

2.4 Benefits

By improving the overall web presence of the campus, this program benefits UCSC at large. As the web is the most common point of introduction for public visitors, this work has a direct impact on the university's ability to attract and retain the highest quality students, faculty, and staff.
The individual projects included in this program vary in the type and breadth of benefit that they will provide. Projects supporting the creation and maintenance of consistent, effective content will indirectly benefit all campus constituencies, and directly benefit those currently responsible for published information. Projects resulting in specific tools and services will directly benefit the divisions, departments, and units that utilize these resources.

At a high level, benefits of the program include:

- An improved web experience, including consistent content, an enhanced function and design, and improved user experience
- Articulated campus web strategies to guide: how UCSC will use the web as a communication asset; how campus will prevent and respond to web security threats; and the establishment of campus-wide responses to legal and regulatory compliance issues
- A robust toolset including a web content management system for developing and maintaining top-tier and departmental web presence
- Clearly defined, accessible standard services and alternatives for those seeking to create and maintain their local web presence

2.5 Stakeholders and Clients

Primary stakeholders for this program are the Chancellor, Executive Vice Chancellor, and principal officers of each division of the campus.

The direct impact of centrally-supported tools and services is likely to vary by division, department, and program. However, components such as the web communication strategy, design standards, and defined roles and responsibilities for content management will have direct impact for all organizational units.

This program is designed to be inclusive, seeking participation and input from constituencies across the campus. Individual project teams will maintain a balance between technical and functional expertise, and the business needs that this work supports.

The proposed governance structure acknowledges that stakeholders and clients are found both in academic and academic-support divisions, at all levels of the organization.

In addition to governance bodies and the project teams, each component of the program will seek interaction and input from campus constituencies and functional units. This vetting and solicitation will assist team members in the development of appropriate project scope to serve the campus at large.
3 Program Components

This program consists of a number of distinct but interrelated components. This section briefly describes the key components, with the understanding that each will be refined and scoped separately, following its own project approval and management processes.

3.1 Program Coordination

The Web Program Leadership Team is responsible for campus-level communication and program advocacy, overall coordination of project deliverables, definition of upcoming work, and alignment to campus strategies and objectives. Their work is deeply integrated with the focus of the Web Council, and requires input and feedback from that governance body.

3.2 Web Governance

Campus-level web governance is central to an effective web presence, as strategies and decisions related to the web directly impact all campus constituencies. This program will design, charge, and interact with two governance bodies:

- Web Council: Reporting to the VCUR and VCIT, this committee is responsible for setting campus strategy for the web as a campus asset, approving policies for content and branding, and prioritizing major projects

- Web Steering Committee: Reporting to the Web Council, this committee is responsible for oversight of campus-wide projects, establishing and overseeing web application and development standards (e.g. accessibility, integration, and ease of use), and prioritizing changes and access to services

3.3 Web Communication Strategy

The Web Council and campus senior managers will coordinate to articulate and publish campus strategies for use of the web as a strategic communications asset. A campus-level strategy will shape and drive the other projects in this program by stating objectives for publishing content and prioritizing deliverables. Maintenance and updating of web strategies will be an ongoing function of the Web Council, with regular reviews informing campus direction relating to the web.
3.4 Web Content Management System

The Web Content Management System project focuses on selecting and implementing a centrally-supported tool for publishing and managing web content. The scope of this project includes: establishing an initial information architecture framework; defining business and technical requirements; evaluating, selecting and implementing a product; and migration of select sites to the adopted platform.

3.5 Web Services Definition

In the current environment, numerous individuals perform web services across campus in the absence of established service definitions, roles and responsibilities. This project will define, articulate, and launch (as necessary) services to support campus web presence.

The primary focus will be on services provided by staff in ITS and Public Affairs. Additional emphasis will be placed on defining roles and responsibilities for distributed content managers, as well as for local service providers who maintain self-supported sites.

3.6 Web Function and Design

Working with governance bodies, campus principal officers, and the Academic Senate, this project will evaluate and recommend a design for UCSC’s official web presence. Scope for this work includes general information architecture (how pages are organized and navigated), visual design (look and feel), and design and development standards for distribution to campus organizations.

A key deliverable of this work is a suite of web templates designed to integrate with the centrally-supported Web Content Management System, as well as adaptable versions that are compatible with other platforms that are commonly-used around campus.

This project will also coordinate with governance to establish and publish updated design standards and guidelines to ensure consistency across all official sites. The scope of these standards may include navigation, branding, interoperability, and compliance with relevant policies and regulations.

3.7 Web Security Response Planning

In coordination with appropriate governance bodies, this project will draft, vet, and publish an implementation plan for prevention of and response to security threats and disasters. This work has critical points of integration with a number of other projects in the program, including Web Content Management System and Web Design Standards.
4  Program Plan

4.1  Approach and Methodology

This program will utilize the established ITS Project Management Methodology. This framework allows for independent proposals of individual projects, effective scoping and vetting, and project oversight during planning and implementation.

Individual projects will be proposed, chartered, approved, and managed separately with documented dependencies and points of integration. Primary review and vetting will occur through ITS and Public Affairs, with formal approvals and project prioritization occurring through web governance bodies (the Web Program Leadership Team will serve as a stand-in approval body until the governance committees are formally charged).

Project managers for each component will be responsible for defining the project’s deliverables, timeline, risks and dependencies. Coordination of deliverables across projects will be the responsibility of the program manager.

4.2  Program Timeline

The final timeline will be dependent upon the schedules of the individual projects. A preliminary estimate of project durations is provided below as a general indication of the tasks involved.

<table>
<thead>
<tr>
<th>ID</th>
<th>Task Name</th>
<th>Start</th>
<th>Finish</th>
<th>Duration</th>
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<tr>
<td>1</td>
<td>Web Content Management System</td>
<td>October 2008</td>
<td>September 2009</td>
<td>12 months</td>
</tr>
<tr>
<td>2</td>
<td>Web Governance</td>
<td>October 2008</td>
<td>--</td>
<td>Ongoing</td>
</tr>
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<td>3</td>
<td>Web Communications Strategy</td>
<td>November 2008</td>
<td>January 2009</td>
<td>3 months</td>
</tr>
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<td>4</td>
<td>Web Services Definition **</td>
<td>November 2008</td>
<td>June 2009</td>
<td>8 months</td>
</tr>
<tr>
<td>5</td>
<td>Web Function and Design **</td>
<td>November 2008</td>
<td>August 2009</td>
<td>10 months</td>
</tr>
<tr>
<td>6</td>
<td>Web Security Response Planning **</td>
<td>December 2008</td>
<td>June 2009</td>
<td>7 months</td>
</tr>
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</table>

** Will have earlier deliverables that feed into Web Content Management System project

4.3  Success Criteria

This program will be a success if the following tangible, measurable conditions are created:
• Focus group assessments reveal greater satisfaction with web presence and services among faculty, staff, and students, when compared to similar inquiries from 2006, 2007, and 2008

• Stakeholder evaluations by key players in University Relations, ITS, and the Academic Senate positively assess the effectiveness of structures, practices, and toolsets developed by this program

• The following are clearly described and supported: roles and responsibilities for supporting the campus web presence; service definitions for all ITS-offered web services; and a robust and stable technical environment supported by best practices and failover

• Information about web standards, services, and expectations for local developers are easy to find, navigate, and understand

• The toolsets and support services for campus clients are defined, allowing divisions and departments to make informed decisions about how best to support their web needs

• Campus investment in web presence is clearly mapped to service levels, providing the ability to adjust spend according to strategies and expectations

4.4 **Issues and Policy Implications**

Each project will identify issues, dependencies, and policy implications independently. Subsequent project charters will document issues related to regulatory compliance, information technology security, and campus policy.

The following issues have implications at the programmatic level:

• It will not be the goal of this program to resolve all web-related issues facing the campus. Each component of the program will have a specific, achievable scope that will be subject to controls and oversight. Issues that are not addressed through the program will be documented and communicated to governance committees for future discussion

• As a new governance body, the Web Council will need to interface with other campus governance and management activities to ensure a balance between broad participation and effective action

• A number of program components require adoption and/or acceptance by the campus community at large. While governance and campus senior management may act as proxy in this respect, an effective, thorough and successful vetting process is considered a requirement

4.5 **Risk Management Plan**

Program-level risks are identified in the following table, with rankings for the probability and potential impact of their occurrence.
<table>
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<tr>
<th>Risk Factor</th>
<th>Probability (H-M-L)</th>
<th>Impact (H-M-L)</th>
<th>Risk Management Action</th>
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<tr>
<td>Engagement and commitment from senior campus leadership on critical components such as Web Governance and the Web Communications Strategy is delayed or incomplete</td>
<td>Med</td>
<td>High</td>
<td>A strongly-worded charge letter signed by the Campus Provost/EVC identifies this work as a campus priority and urges participation. Recruitment activities set expectations for time commitment and outcomes.</td>
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<tr>
<td>Broad rejection by campus constituencies of key components such as the selected WCMS tool, the selected Look &amp; Feel templates, or design standard requirements</td>
<td>High</td>
<td>Med</td>
<td>This risk is high probability because campus constituencies each have legacy investments in technology, process, and culture in their approach to meeting their web needs. Strong commitment from senior campus leadership will balance this risk, and it will be prevented if each of the projects is diligent in vetting and reviewing plans with key stakeholders.</td>
</tr>
<tr>
<td>Funding requests are unmet or cause significant delays</td>
<td>High</td>
<td>High</td>
<td>Funding requirements for this program will not be clear until many of the projects are well underway. There is a risk that, once the requirements are known, significant delays impact projects as the campus deliberates about funding mechanisms. Funding discussions with options and scenarios will be initiated as soon as possible.</td>
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<tr>
<td>Net deficiency in total FTE allocated to supporting web presence</td>
<td>High</td>
<td>Med</td>
<td>Numerous reports and analyses have recommended that additional FTE be dedicated in this area. At the outset, this program makes no assumptions about resources required, but notes that this is a risk. Staffing requirements will be noted as soon as they are highlighted, and included in all funding discussions.</td>
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## 5 Program Organization and Staffing

Each project will identify its own organization and staffing requirements. The following roles have been identified at the program level:

<table>
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<tr>
<th>ROLE</th>
<th>NAMES &amp; CONTACT INFORMATION</th>
<th>RESPONSIBILITIES</th>
<th>TIME</th>
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<tr>
<td>Executive Sponsors</td>
<td>** - Donna Murphy, VC University Relations</td>
<td>Accountable for program success, work with Web Council to align with campus goals, approve approach and schedule, advocate for the program, deliver funding, resolve resource conflicts</td>
<td>4-6 hours per month (or as needed)</td>
</tr>
<tr>
<td>Program Manager</td>
<td>** David Turner, Assistant Director PMG</td>
<td>Define and coordinate program deliverables, execute program tasks, identify risks and dependencies, report status, implement changes, receive and act upon direction from executive sponsors</td>
<td>20% FTE (percent time measured per annum)</td>
</tr>
<tr>
<td>Program Team Members</td>
<td>** - Barry Shiller, AVC Public Affairs</td>
<td>Recommend program strategies, approach, priorities and schedule</td>
<td>1.5 hours per month (or as needed)</td>
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<td>Program Governance</td>
<td>Web Council</td>
<td>Prioritize projects within program, set strategy for web as a campus asset, review and recommend deliverables and approach</td>
<td>2 hrs per month (or as needed)</td>
</tr>
<tr>
<td>Web Service Manager</td>
<td>David Turner (Interim), Assistant Director PMG</td>
<td>Represent customer perspective to program and projects, answer Five Questions and develop service roadmaps, develop service metrics for measuring service success</td>
<td>20% FTE (percent time measured per annum)</td>
</tr>
<tr>
<td>Advisers and Resources</td>
<td>** - Pat LeCuyer, Director Applications Solutions</td>
<td>Advise on creation and coordination of deliverables, review and comment on program/project documentation, identify risks and dependencies, assign key resources to individual projects</td>
<td>As needed</td>
</tr>
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</table>

** Participates in Web Program Leadership Team
6 Program Budget

No significant expenditures are anticipated at the program level. Each project will identify budget and staffing requirements within its own approvals process, and the Web Program Leadership Team / governance bodies will be responsible for controlling costs across projects.