UC SANTA CRUZ

UCSC Web Services Definition Project Charter

Information Technology Services, Public Information Office

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Reviewers

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Distribution

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1 Project Background

1.1 Problem/Opportunity Description

Web presence at all levels of the institution is widely accepted as one of the most critical components of UC Santa Cruz's external and internal communication. The services that support the campus web presence are made up of people, processes, and technologies that cross the boundaries of divisions, departments, and business operations.

The UCSC Web Presence and Services Program will deliver a series of projects to improve the technology and visual design of campus web presence. The Web Services Definition project recognizes that, without an underpinning of clearly organized, well-defined, and properly supported services, new designs and tools are destined to fall short of delivering a sustainable web presence capable of growing and adapting to meet the needs of the University.

The Web Services Definition project will define and implement a framework of services to support web presence at UC Santa Cruz. Coordinating with the Web Content Management System Project, the Web Function & Design Project, and campus web governance, this work will establish a service team to deliver customer-facing services that enable campus clients to publish information to the web.

1.2 Goals

A service is something that provides value to the customer. As such, web services go beyond the servers, applications and infrastructure that produce web pages. This project will focus on developing services with a client point of view, bringing together campus governance, content managers, end users, and service providers to clearly define the service offerings that support our web presence.

The goals of this project include:

- Defining web services in a way that is meaningful to the customer and aligns service providers to delivery and support

- Improving the experience of end-users in accessing campus web services and obtaining support for incidents and requests

- Establishing a web service team to plan and support the lifecycle of web services, create effective processes, and set expectations for customers and web service providers

- Defining roles and responsibilities across the spectrum of web services

Guiding principles for this work include: a focus on the end user perspective, designing services that meet the needs of campus clients; streamlining

communication and cooperation between service providers across organizational units; and creating a culture of clear priorities, transparent decision making, and setting and meeting expectations.

1.3 Benefits

The benefits of this project will be directly experienced by campus clients in the form of more positive, effective experiences with the development, hosting, and support of their websites. In addition, web service providers across the campus will benefit through clearly established expectations, both between themselves and their clients, and with other service providers.

High level benefits of this project include:

- Services presented with a client perspective

- Improved client understanding of what services they can access, how to obtain them, and what they can expect in terms of service levels and pricing

- Clarified roles and responsibilities both for service providers and for clients

- Improved compliance with security and acceptable use policies

- Effective collaborations between service providers across campus based on agreed expectations, roles, and service levels

1.4 Out of Scope

The following is a list of tasks and activities that, while related to service definition, are explicitly out of scope for this project. Each item on this list is accounted for by other projects in the Web Presence and Services Program, and will be tracked as a cross-dependency.

- Development of standards for content, design, development or supporting standards

- Creation of design templates, content for web sites, or information architecture

- Selection and implementation of specific technology tools to support web services

- Implementation and adoption of campus policies related to web

- Web experience and requirements of target audiences of the campus's web presence. The needs of visitors to the website are addressed in other projects in the Web Program

1.5 Stakeholders and Clients

Web services defined by this project impact a broad variety of stakeholders. The following list identifies some categories of stakeholders.

Service Clients:

- Academic and Academic support divisional stakeholders – Client-facing services allow campus constituencies to focus more on the content they need to publish, rather than investing in web infrastructure, training, and technical staff

- End Users / Content Managers – Service definitions, expectations, and pricing that make sense to users enhance the productivity of faculty, staff and students who supervise and maintain "official" UCSC websites

Service Providers:

- Public Information Office/University Relations – Well defined services and roles contribute to a more consistent, up-to-date web presence

- Information Technology Services – As the primary service providers, clear and unambiguous service definition facilitates efficient and effective response to service requests, while service management practices improve predictability and optimize resource use

2 Project Scope

2.1 Objectives

The objectives of this project include readily accessible, clear documentation about what services are available, and how to obtain them. In addition, a primary objective is to create effective, positive working relationships and handoffs between service providers.

2.2 Deliverables

The following table lists the high-level deliverables that support this project's goals. To reinforce the emphasis on designing services from the client perspective, each deliverable is accompanied by a description of the client view:

Project Deliverable	Client View
Public facing service definition for available web services, including a Service Level Agreement (SLA) and inclusion in the ITS Service Catalog	What services are available, and how do I get them? How do I get support? What does it cost?
Definition and clarification of local web services for each division, including seamless handoffs between service providers	Why should I have to know who provides my web services? Are my service options different from someone else on campus?
Service definition for the creation, maintenance, and update cycle for standard design templates	What options do I have for the visual design of my site? When should I expect these to change?
Roles and responsibilities for faculty, staff and students who supervise and maintain "official" UCSC websites	What do I have to know when I post content to the web? What are my responsibilities?
Operating level agreements between service providers across divisions and units to clarify responsibilities, interactions and expectations behind the scenes	My web requests should not be delayed and bounced around by service providers. As far as I'm concerned, it's all one service.
Metrics for measuring success of and guiding improvement to defined services	How does my experience compare to the rest of the campus? How will you show us that you are delivering on your commitments?
A service team and service manager for web services, with connections to campus governance	Who makes the decisions that affect the services I receive? How do I give feedback about how these services work for me?
Integration of service requests into existing ticketing systems and processes	How do I get support? Who do I contact for help?
Recommendations to ITS for additional alignment or process development to meet desired service delivery and support objectives	What are the next improvements to services, and when can we expect them?
Recommendations to campus for additional resources required to meet desired service levels, if necessary	Even with these improvements, web services still seem understaffed. What will it take to provide the services we really need?

2.3 Services to Define

The following list is provided as a starting point for considering what services campus clients need. The list represents a mixture of services as they are currently defined, and anticipated new offerings.

Early activities of this project will be to generate an inventory of current services, and a more customer-facing list of services to define for use by the project team.

- Web Consultation, Design, Communication Strategy, Content, and Technology

- Web Content Tools and Services

- Web Hosting

- Web Applications and Databases

- Referral Services

- Instructional Web Services

- Academic Web Services

3 Project Plan

3.1 Approach and Methodology

The following strategies will be implemented to ensure the success of this project:

- Flexibility of approach and deliverables will be a guiding principle in this work – this project will adapt to produce results that respond to the needs of the campus

- A project team representing known stakeholders will coordinate efforts and optimize project scope

- Interactions with service providers and key stakeholders will be used for gathering data, testing deliverables, and capturing customer perspectives

- Project work will be coordinated and integrated with concurrent service definition underway in the Web Content Management System project, and will utilize service-related findings from the WCMS Requirements Gathering process

- Team members will make use of service definition tools (the "5 Questions for Services") and templates previously published by the IT Service Management unit of ITS

- Guidance, review, and approval of deliverables will be managed by web governance bodies

- Gaps in processes, resources, and organizational structures will be identified and communicated to web governance for future resolution

3.2 High-Level Project Timeline

Milestone	Date
Team meetings begin	April 2009
Initial list of services to be defined identified	April 2009
Web Service team charged	May 2009
Web Tiers recommended to governance	July 2009
Draft service definitions (5 Questions)	July 2009
Campus roles and responsibilities recommended to governance	September 2009
SLA/OLAs complete	October 2009
ITS Service Catalog and SLA Publication	December 2009
Project close	December 2009

3.3 Success Criteria

The project will be successful if the following criteria are met:

- Service level agreement, ITS Service Catalog, and other relevant service definitions are updated and published

- Service providers support the published definitions as specific, realistic descriptions of the services they support

- Campus clients demonstrate acceptance of their own responsibilities by identifying individuals to fill defined roles (e.g., "content manager," or "content approver")

- Tracking of metrics demonstrates consistent ability to meet service level targets

3.4 Risk Management Plan

Risks and dependencies are identified in the following table, with rankings for the probability and potential impact of their occurrence.

Risk Factor	Probability (H-M-L)	Impact (H-M-L)	Risk Management Action
Constrained resources due to competing workload demands for all participants, including commitments to other projects within the Web Presence and Services Program	High	Med	Work identified in this project will be carefully scoped and phased so that the appropriate level of detail is achieved at the right time. In most cases, this project can be adapted around deliverables and time lines for other projects.
Known resource shortages in key areas and budget constraints, limiting options for defining services that meet demands of campus clients	High	Low	Mitigations for this risk begin with budget planning efforts at the program level – as information about available resources becomes clear, service definitions will be adapted accordingly.
Sponsor organizations and / or governance bodies reject or fail to implement deliverables and recommendations from project team due to budget constraints or shifting priorities	Med	High	Numerous projects and committees have attempted similar work in the past, without achieving desired results. Mitigations for this risk begin with the clear sponsorship of ITS and UR, which will be the divisions accountable for implementing change. Additional mitigations include periodic review with program leadership and governance, and a focus on delivering services that are properly scoped for available resources.

There is a risk of delay or incomplete work packages based on dependencies on governance. For instance, definitions of "official" websites, articulation of web tiers, and policies surrounding adoption of standards may all impact how services are defined.	Med	Med	Mitigations include: maintaining a flexible approach so that service definition may be adjusted as governance outputs are delivered; clearly articulating policy dependencies so that governance bodies can prioritize activities; and focusing on customer-facing service definitions.
End users reject service definitions and/or roles & responsibilities due to perceived increase in workload	Med	Low	Probability is medium because in many cases, time savings for local content managers will be readily apparent. Mitigations include client focused language in service definitions and buy-in from campus leadership
Interdependence with the WCMS project, requiring careful coordination of deliverables and distribution of workload	Med	High	Key interdependencies with WCMS are known, but this project will remain adaptable to new or adjusted needs. Continual communication between the projects will minimize this risk.
Identifying and regularly accessing data for metrics is a challenging aspect of service management in general, and will be a dependency for this project	Med	Low	Impact is low because assessment metrics are often developed and refined over time. This project will establish metrics based on available data, and transition ongoing development to the service team.

3.5 Work Breakdown Structure

Deliverables/Timeline	Work Description/ Team Members
1) Service Identification & Draft Service Definitions April – July 2009	The entire project team will refine the initial service list and outline the scope of services to be defined. A sub-team will then identify services to be defined and draft service definitions based on the 5 questions model.
2) Campus Web Tiers April – May 2009	A sub-team will validate and update the web tiers recommendations provided by the Web Content Management (WCMS) Team. Identify the scope and impact of campus adoption, draft standards and process implications, and present to the Web Council.
3) User Testing April – August 2009	A sub-team will identify key stakeholder representatives (service providers, service groups, paying customers, and users) and conduct user testing to validate and improve presentation of services
4) Roles and Responsibilities	A sub-team will validate and update the roles

June – September 2009	and responsibilities provided by the Web Content Management (WCMS) Team.
	Identify the scope of campus adoption, draft formatting and publishing recommendations, and present to the Web Council.
5) Service Level Agreements: Draft Definitions July -- October 2009	A sub-team will take the drafted service definitions and define appropriate service levels for publication to campus.
6) Operating Level Agreements (OLAs) July – October 2009	A sub-team will identify service providers that support the defined services.
	Lead a series of collaboration sessions to draft OLAs that set expectations, document roles and responsibilities, and ensure steady and consistent service delivery.
	(See SLA Project for more on this process)
7) Publication and Transition November – December 2009	A sub-team will finalize and document all project outcomes and hand off service definitions to service team.
	Publish services in ITS Service Catalog and SLA Publications.
8) Project Closure December 2009	The entire team will complete project closure documentation, including project review and lessons learned.
	Celebrate.

4 Project Organization and Staffing

ROLE	INDIVIDUAL / GROUP	RESPONSIBILITIES
Project Sponsors	Janine Roeth, Director IT Services Jim Burns, Director Public Information Office	Make business decisions for the project. Participate in planning and oversight. Make resources available, approve work products, and dispose of issues and project scope change requests
Project and Service Manager	David Turner	Reports to and receives direction from sponsors. Participates in and approves project plans and deliverables. Manages, reviews, and reports on project work plans with objective to stay on time and on budget. Manages project resources. Identifies required project team members and constructs project teams.

ROLE	INDIVIDUAL / GROUP	RESPONSIBILITIES
Project Team and Members	Aaron Melgares Marion Bashista Jill Esterás Rob Knight Charles McIntyre Peter McMillan Robin Ove Brigitte Parot Linda Rosewood Carla Rounds Teresa Silva	Team Lead / Service Management Consultant PMO Representative Academic Department Client Representative PIO Representative Web I&A Service Provider Representative Divisional Liaison Representative FITC Representative Academic Division Team Representative Support Center Representative Academic Support Service Provider Representative Project Assistant
Governance	Web Steering Committee	Project oversight and approvals

5 Project Budget

No significant expenditures are anticipated. The resources for this project consist primarily of time commitments from existing staff. Recommendations coming out of the project may propose additional resources in the form of FTE and/or tools required to meet desired service levels.

6 Appendix A- Additional Information

Preliminary Service List: Customer Questions and Services

Customer Questions	Corresponding Service

- How do I figure out what I need for a website? - How do I design my website content so that it is useful to my target audience? - What are my design options within the campus standards?	Communication Consultation Services
	  - Evaluate the right medium (may not be web)
	  - Evaluate audience, relationship to other communication tools
	  - Information architecture tools

- All I have is content. How do I set up a unit/dept web site? - I have a site now, but I don't want to do the technical support anymore. How can I move into a supported web environment? - I'm a faculty member, and I need a faculty web page. How do I get my information online? - Do you offer web chat / survey tools / blogs / wikis?	Web Site Content and Design
	  - Content hosting environment
	  - Migration services
	  - Template options
	  - Baseline web 2.0 tools
	  - Standard templates
	  - Content & design guidelines

- I know how to design and maintain my site, I just need somewhere to put it. Where can I host my site? - My site has been up and running for some time, but the hardware is getting old. Where can I host my site?	Web Hosting
	  - Web lockers
	  - Baseline supported platforms
	  - Technical support
	  - Backup/recovery

- I need our database / application to post information to the web. - We have an online application, but there's something new that we need it to do.	Web Applications and Databases
	  - Application design & development
	  - Departmental applications support

- I need a complete web design that doesn't use the campus templates. - The web tool that I need is not offered by the WCMS. Where can I go to get it set up? - I want to put up a personal web page.	Referral Services
	  - Referrals may require governance review
	  - Recommended web design firms
	  - Recommended personal web page hosts
	  - Development by LITS

- How do I create web-based learning materials? - How do I post my existing class materials online for my students to access?	Instructional Web Services
	  - Course materials development & hosting
	  - Learning management system

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