University of Waterloo Library Website Redesign Project Charter

Project Sponsors: Pascal Calarco, Annie Bélanger
Project Manager: Andrew McAlorum

1   Introduction

In 2009, Drupal was identified as the content management system (CMS) for University of Waterloo and migration to the new platform began in 2011. A Drupal distribution specific to the University of Waterloo functionality requirements was developed by Information Systems & Technology (IST) and coined the Waterloo Content Management System (WCMS) which became the standard for Drupal development at the University. IST offers many services free of charge to university departments migrating to the WCMS, including development and theming, hosting, security audits and patches, backups, software upgrades, accessibility checking, usability testing, quality assurance, migration assistance, and training. The *University of Waterloo Library Website Redesign and Migration* project will leverage the services offered by IST by migrating the library website to the WCMS.

1.1   Background

The Library has had a website since the mid-1990s. Over the years, it has gone through many look and feel redesigns. The last redesign was in 2005, when the Campus brought out the Gold Standard Template. The Library's website is now one of the largest websites at the University of Waterloo. The current website is maintained using the former centrally supported tools for website creation and maintenance, Adobe Dreamweaver and Contribute.

In the past, the Library has had a distributed approach to supporting its web presence, with many web administration and content authoring duties being the responsibility of web maintainers. It has been an unstructured approach without a central body to do quality assurance or to ensure usability of the website. This has resulted in the website having overly complicated and inconsistent navigation, duplicated and redundant content, inconsistent terminology and naming, and violating widely-accepted web best practices. This can be disorienting to site visitors and counterproductive to users who rely on the web to access information and resources for research.

1.2 Objective

The University of Waterloo Library WCMS team will migrate the website to the WCMS Drupal distribution, replacing Adobe Dreamweaver and Contribute. In the process, the website will be redesigned to be aligned with the current University of Waterloo theme, in an effort to promote a common look and feel across all university websites. A content strategy and information architecture plan will be devised to assist in the creation, migration, revision, and deletion of web content. Migrating to the WCMS will help ensure the accessibility and usability of the library website, as well as allow the library to offload time-intensive web and system administration duties to IST, such as managing servers, upgrading software, and managing application revisions and backups.

In order to safeguard against issues with scalability, permissions, security, updating, and content duplication, a multi-site approach will be taken to the migration project. This will allow for new sites to be added seamlessly as they arise, that benefit from the same codebase while also having a distinct database.

2 Scope

- Implement a Drupal multi-site installation that includes the following sites:
    - Library main site
        - Includes: Search, Services for, About us, Help & Instruction, etc.
        - Special Collections and Archives
        - Geospatial Centre
        - Musagetes Architecture Library
        - Adaptive Technology Centre
        - AODA Toolkit
        - Library Advancement
        - Library News
        - Library Technology Services
    - Copyright Guidelines
- Redesign library website to the current University of Waterloo theme to promote a common look and feel across all university websites.
- Implement a content strategy and information architecture that is consistent across all sites while also providing site-specific navigational requirements.
- Create content for WCMS sites and migrate content where applicable.
    - Content team will work with content maintainers to update, revise, and delete content as part of the redesign.
- Facilitate content reuse to reduce content duplication

2.1 Out of Scope

- Library catalogue (TRELLIS)
- Library Discovery Layer (Primo)
- Library staff web (Intranet)
- Library Subject guides (LibGuides)
- TUG ERM
- Library staff collaboration sites (SharePoint)
- Digital Collections

Please note that items currently out of scope can be reconsidered for migration after the *University of Waterloo Library Website Redesign and Migration* project is complete.

2.2 Deliverables

- A fully functional library website that is compliant with:
  - Accessibility for Ontarians with Disabilities Act (AODA)
    - http://www.e-laws.gov.on.ca/html/source/regs/english/2011/elaws_src_regs_r11191_e.htm
  - Web Content Accessibility Guidelines (WCAG) 2.0
    - http://www.w3.org/TR/WCAG20/
  - University of Waterloo Brand Guidelines
    - https://uwaterloo.ca/brand-guidelines/
  - University of Waterloo Marketing and Strategic Communications Writing Style Guide
    - https://uwaterloo.ca/communications-public-affairs/sites/ca.communications-public-affairs/files/uploads/files/waterloo-writing-style-guide-2012-03-29.pdf
  - Guidelines for the use of WCMS
    - https://uwaterloo.ca/web-resources/wcms-users/guidelines-use-wcms
- A website that is informed by:
  - Library Public Website Web Design & Development Standards
    - https://sharepoint.uwaterloo.ca/sites/LibraryISR/committees/webops/Shared%20Documents/Library_WebStandards_10-2012.docx
  - University of Waterloo Library User Needs Assessment Survey Final Report
    - https://sharepoint.uwaterloo.ca/sites/LibraryISR/committees/webops/Shared%20Documents/uWaterloo_Library_User_Needs_Assessment_Survey_Report_summary.pdf
  - University of Waterloo Library Usability Report
    - https://sharepoint.uwaterloo.ca/sites/LibraryISR/committees/webops/User%20Needs/WebsiteUsabilityReport-Final.docx
- A software development project management tool

- JIRA - https://libjira.uwaterloo.ca
- A project collaboration and document management tool
  - SharePoint - https://sharepoint.uwaterloo.ca/sites/LibSys/WCMS/SitePages/Home.aspx
- An issue tracking system and external service desk
  - RT via library.help@uwaterloo.ca - http://rt.uwaterloo.ca
- A Project Communications Plan that is fully implemented

2.3 Main Project Success Criteria

The website must meet all written specifications (listed above) and be thoroughly tested. Project sponsors will formally approve the project with advice from other key stakeholders.

3 Approach

3.1 Project Management

The Digital Initiatives development team has adopted the Scrum software development methodology of Agile project management which is based on iterative, user-focused development practices that apply collaborative, team-thinking and adaptive, flexible response to change.

The 'Release early, release often' software development philosophy will also be applied whenever possible to create a tight feedback loop between developers, testers, and users. Sites will then be iterated and improved based on subsequent feedback and testing.

3.2 Communications

- Daily, standing scrum meetings of the development team
- Biweekly sprint planning and review meetings of the development team
- Biweekly operational meetings of the WCMS team (development and content teams)
- Biweekly meetings of the content team
- Biweekly progress meetings with Project Sponsors
- Monthly WepOps committee meetings
- Public announcement and request for feedback with the launch of each site
- Project progress updates in the monthly News @ Your Library, whenever possible.
- A library staff website where the project charter and other key documents can be viewed.

See the Communications Plan for our strategic communications plan with the University of Waterloo Library community.

3.3 Timelines

The following table represents our current understanding of the project and all dates are tentative and subject to change.

Milestones	Web Address	Launch Date
Copyright Guidelines	http://uwaterloo.ca/copyright-guidelines	Oct. 23, 2013
Adaptive Technology Centre	http://uwaterloo.ca/library/accessibility	Jan. 9, 2014
AODA Toolkit	http://uwaterloo.ca/library/aoda-toolkit	Jan. 9, 2014
Musagetes Architecture Library	http://uwaterloo.ca/library/musagetes	Jan. 15, 2014
Library Web Redesign	http://uwaterloo.ca/library/web-redesign	Feb. 11, 2014
Library Technology Services	http://uwaterloo.ca/library/technology-services	March 4, 2014
Library Advancement	http://uwaterloo.ca/library/support	March 1, 2014
Library News	http://uwaterloo.ca/library/news	April 1, 2014
Geospatial Centre*	http://uwaterloo.ca/library/geospatial	August 1, 2014
Special Collections & Archives*	http://uwaterloo.ca/library/special-collections-archives	August 1, 2014
Library (soft launch)**	http://uwaterloo.ca/library	August 1, 2014
Library (hard launch)	http://uwaterloo.ca/library	Jan. 5, 2015

* Migration of these sites are dependent upon the Digital Collections project, a digital repository where all digital collections will be migrated to.
** Available to the public via a 'try our new site' link along the header of existing site. Over the course of the summer and fall 2014 term, formal usability testing and feedback gathering will take place which will inform site iteration for hard launch in January 2015.

3.4 Executive Decisions

Any large changes in scope, timeline, and budget must be approved by Project Sponsors.

4 Staffing

Role	Name	Responsibilities	Time
Project Sponsor	Pascal Calarco Associate University Librarian, Research & Digital Discovery	Approve changes to scope, identify and secure funding, approve deliverables. Make business decisions for the project, participate in key activities, make resources available, approve work	As needed

	Annie Bélanger Associate University Librarian, Information Resources & Academic Excellence	products, address issues and approve change requests.	
Project Manager	Andrew McAlorum Head, Digital Initiatives	Reports to and receives direction from Project Sponsors. 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, develops and implements a communication plan in collaboration with the Communications Librarian, leads consultation sessions with key stakeholders as required, lead workflow development, leads permissions and roles structure, and reviews and approves deliverables.	High
Technical Lead/ Developer	Graham Faulkner Programmer/ Web Developer	Reports to and receives direction from Project Manager. Develops the functional requirements of the new site, assists in the accessibility of the site with periodic audits of the design, creates the front end coding for design implementation, assists with the development of user gateways, and ensures design can be implemented in WCMS environment and that the WCMS will meet functional requirements. Develop Drupal infrastructure, define required module development to meet Library functional requirements, develop approved modules, ensures development follows usability best practices, collaborate with Technical Lead to ensure	High

Role	Name/Title	Responsibilities	Risk
		development meets accessibility requirements, assist with the implementation web templates in Drupal, generate websites, assign user roles and permissions, and administer change requests for WCMS.	
Accessibility Lead/ Developer	Chris Gray Systems Analyst	Reports to and receives direction from Project Manager. Develop Drupal infrastructure, define required module development to meet Library functional requirements, develop approved modules, ensures development follows usability best practices, collaborate with Technical Lead to ensure development meets accessibility requirements, assist with the implementation web templates in Drupal, generate websites, assign user roles and permissions, and administer change requests for WCMS.	Medium
Content Lead	Nancy Collins Communications Librarian	Receives direction from Project Sponsors. Manages the content development for the project. Creates and leads the implementation of a communication strategy for the project. Provides guidance to Content Strategist and Content Development Assistants in the content migration, updating, revision, and deletion. Ensures content development is in line with content strategies, best practices, and positioning.	Medium
Content Strategist	Sarah Forgrave Content Strategist	Reports to and receives direction from Project Manager and Content Lead. Develops new site information architecture(s) and navigation, assesses the need for sub-sites, develops terminology/taxonomy to standardize and streamline user experience, leads user testing as related to the information architecture and navigation, develop Drupal taxonomy, leads the content	High (1 year secondment)

		development for user gateways, creates content strategies for content co-ownership and re-use, assist with workflow development, creates content recommendations for all top-level pages, and participates in key stakeholder consultations.	
Content Development and Support	Esther Millar Coordinator, Library Communications and Web Management Rose Koebel Assistant, Communications and Web Development	Reports to and receives direction from Content Lead. Assists in content migration, accessibility of the site and implementing quality assurance results using the content strategies, best practices, and positioning. Assigns user roles and permissions and administers change requests for the WCMS. Troubleshoots and acts as a resource person for content maintainers when they have questions or difficulties.	Medium
Project Assistant	UW coop student (Summer/Fall 2014)	Reports to and receives direction from Project Manager. Assists with formal usability testing and feedback gathering. Assists with data migration. Other duties as required.	High

5 Issues, Risks, and Assumptions

5.1 Critical Partnerships

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

- Leadership support:
  - IST
    - Kris Olafson, Manager, Web Development (WCMS Project Lead)
    - Heather Wey, Supervisor, Waterloo Content Management System Migration
    - Lisa Tomalty, Manager, Customer Relations and Support (RT project Lead, IT Best Practices Committee Chair)
    - Bill Baer, Senior Computing Consultant (Library Service License Agreement Point of Contact)
    - Bob Hicks, Director, Client Services
    - Terry Stewart, Director, Information Technology, Applied Health Sciences (Web Advisory Committee Chair)
    - John Woodcock, Project Manager, Portfolio Management

- - Colin Bell, Director, Enterprise Architecture
    - Bruce Campbell, Technology Integrated Services
  - o Marketing and Strategic Communications
    - Joe Kwan, Manager, Information Architecture and User Experience
    - Andrea Sweet, Manager, Web Design
    - Mark McKay, Head, Digital Initiatives
- Project Strategies and key decisions: LibExec, Library Managers, WebOps
- Development of standards and guidelines: WebOps, Library Managers
- Cross-project dependencies: WCMS, Library WCMS Implementation, Digital Initiatives Department Priorities, Content Developers Availability

5.2 Risks

- There may be an inability to acquire all of the internal specialized technical knowledge required to implement the project through training or hiring in a timely, cost-effective manner
- The large number of content developers and stakeholders in the Library may pose a challenge to the successful Library-wide implementation of Drupal in terms of adoption, timelines and consistent implementation of the design and information architecture
- The availability of project team members to allocate time to the project given other work priorities and responsibilities may impact on the project schedule
- IST hosting outages and technical issues
- Communications and Public Affairs changes in policy and staff that affect development practices

5.3 Assumptions

- A core dedicated group of full-time staff will be established for the duration of the web redesign project
- Project team members will have the technical skills and training support (both internal and external) required to execute the project
- Each individual project team member needs to work with his/her manager to ensure that adequate time will be made available to work on project assignments. Any project team member that is unable to perform satisfactorily or produce deliverables on time will be subject to review and possible replacement on the team. Project timelines will be changed accordingly
- The web content management system must be in place before a new website can be implemented
- An iterative usability and accessibility testing protocol will be put in place and supported