



Web Content Management Initiative
Vision and Scope

Version 2.0
11 May 2007

ABOUT THIS DOCUMENT

The Vision and Scope serves to establish a common understanding of the problem(s) being addressed by the Web Content Management Initiative, the campus's business requirements, and the breadth of the proposed solution. In this document, the project team and steering committee are committing to the underlying assumptions and dependencies intrinsically associated with successful execution of the initiative.

This is release/version **2.0** of the Web Content Management Initiative **Vision and Scope** document.

The Vision and Scope is a managed document. For identification of amendments each page contains a release number and a page number. Changes will only be issued as a complete replacement document. Recipients should remove superseded versions from circulation.

This document is has been reviewed and approved by the Steering Committee and project team and is authorized for release.

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Summary

Often lacking in adequate training, tools and staffing, departments frequently resort to inefficient and time-consuming techniques to implement even the slightest of changes to Web content, making the process of maintaining sites challenging and laborious. One of the consequences of such a distributed, resource-intensive approach can be seen in the tremendous variation in quality and effectiveness—and compliance with federal law—with far too many Web sites ranking at the poor end of the scale. Even some professionally designed campus sites fail to support UC Davis communication standards and goals.

The lack of consistency in the appearance, contents and quality of Web sites broadly impacts the entire campus, and necessitates a comprehensive solution. University Communications and Information and Educational Technology have initiated a cooperative, multi-phase plan to provide the information, resources and tools necessary to address the workload and process issues affecting Web content managers across campus, and to define, promote and support UC Davis' Web standards. A key phase in the strategy involves the identification, selection and deployment of solutions that support improved Web content management processes and workflows, including a Web Content Management System (CMS).

Collaboration and Community Involvement

The Web Content Management Initiative is a campus wide effort led by University Communications and Information and Educational Technology (IET). The project team and activity committees include representatives from:

- Groups involved in the management of policy and resources related to Web content;
- Webmasters, content providers and technologists from many campus units; and
- Campus advisory groups (Campus Council for Information Technology, Technology Infrastructure Forum, Senior Advisors, AdMAN, etc.).

The Web Content Management Initiative will introduce a new way of developing and maintaining Web pages for Web, technology, and communications staff as well as other staff and faculty across the campus. To prepare for this change, it is critically important to ensure that the project continues to offer opportunities for members of the campus community to participate in the planning and evaluation processes, and contribute to other key activities where appropriate and possible. Opportunities for campus involvement will include:

- Representation on the various committees
- Participation in surveys and focus groups
- Attendance at project-related events and presentations (e.g., for interested departments, constituencies, etc.)
- Participation in the pilot program
- Ability to communicate directly with the project team via the project's Web site (<http://cms.ucdavis.edu>)

Problem Statement

The World Wide Web is in many ways UC Davis's most important communication medium, and has been identified by campus leadership as a top priority for improvement.

Over the years, a great majority of campus units have created Web sites as a way of sharing information with internal and external audiences. However, maintenance and standardization of the content on many of those sites has been inadequate due to a lack of resources for time-consuming, technical and demanding Web content management tasks. Many UC Davis departments must rely on students or non-technical staff to develop and maintain their Web sites using independently defined, often ineffective workflows that evolve as needed and that are usually limited by a lack of resources. Web standards are not widely known and sometimes ignored, and those responsible for adhering to them lack a forum or resources to support the exchange of information and improvement of Web management processes.

As a result, UC Davis's many Web sites frequently contain outdated, poorly organized and non-compliant content, thereby adversely affecting our ability to communicate effectively with important Web audiences: prospective and current students, faculty and staff, alumni, donors, corporations, media, foundations and government agencies.

Based on a survey conducted by the project team in December 2006, key factors and contributing areas of concern include:

1. Heavy workload among campus Web content managers, programmers, copywriters and other individuals tasked with updating Web pages.
2. Cumbersome publishing processes.
3. Disparity in technical expertise, staff, and resources among campus units.
4. Lack of familiarity with official Web standards and Web practices:
 - a. Lack of clear UC Davis identification and integration of brand identity across sites
 - b. Poor and inconsistent navigation from site to site, and even within sites
 - c. Inconsistent or no compliance with published graphic, editorial, technical and legal standards
 - d. Insufficient accessibility of content to persons with disabilities
 - e. Out-of-date, inaccurate and unclear content

The popularity of the UC Davis site and extensive use by its broad and varied audiences reflect the value and importance of this medium to campus stakeholders: from the period July-September 2006, the UC Davis home pages recorded an average of over 1.65 million page views per month, with the majority of traffic coming from off campus. The Web Content Management Initiative seeks to improve the efficacy, consistency and efficiency with which campus communicators are able to use the Web to provide critical information to these audiences.

Vision of the Solution

The Web Content Management Initiative will be a critical component of the effort to improve Web-based communications and to promote and facilitate compliance with campus standards for Web content, architecture, presentation and accessibility. It will provide a centralized system for creating, editing and publishing well designed, standards-compliant and accessible Web sites without requiring technical expertise, and the support and information resources required to effectively leverage new tools and methodologies.

Benefits

The UC Davis Web Content Management Initiative will provide significant benefits to departmental content managers, technical and administrative staff, and Web communicators. These groups will see time and cost savings while being able to more easily manage sites, create and modify content and meet official Web standards.

1. Communicators will be able to focus on content, not technology.
CMS eliminates the bottleneck associated with traditional Web development processes by providing tools that are intuitive and easy for anyone to use.
2. The process of building and maintaining Web sites will be streamlined and clarified.
CMS define authoring workflows, user roles and content accessibility to improve efficiency and expediency in the creation, review and approval processes.
3. Communicators and technical staff will be able to work together more easily.
CMS workflow capabilities empower webmasters and content managers to distribute authoring responsibilities for the Web sites that they administer.
4. Site managers will be able to comply with campus standards for design, accessibility and branding.
Web site design is maintained independently of content within the CMS, meaning that the appearance of pages is driven by templates that are applied as content is created and accessed. As a result, the user interface and layout of site pages is consistent and automatically supports the branding, identity, and accessibility standards built into the templates.
5. Campus Web sites will be more secure from hostile influences.
CMS inherently provides significant security advantages over traditional, file-driven Web sites that require FTP access in order to implement changes:
6. Web-site maintenance costs will be reduced.
Ease of access to content significantly decreases reliance upon expensive technical staff and resources. Existing non-technical staff are able to manage a CMS-based Web site and develop content without having to learn new programming or design skills.

Scope and Limitations

The Web Content Management solution will initially be tested and deployed in a voluntary pilot program involving a diverse, select group of administrative and academic participants that represent the broad functional needs of the campus. Using the pilot as a basis for the development of a comprehensive, efficient and effective strategy for deployment, the solution will be offered campus-wide to academic and administrative units as part of the broad initiative to encourage use of more efficient, effective and accessible Web resources and practices. Participation will be strongly encouraged but not mandated.

The Web Content Management solution will not be offered to owners of personal or affiliated Web sites (see UC Davis PPM 310-70 for definitions).

Assumptions and Dependencies

- The Content Management Initiative will provide the information, technical and educational resources and tools necessary to alleviate Web management workload problems and improve Web content management processes and workflows across the campus. A central goal of the initiative is to identify, acquire and deploy a Web Content Management System (CMS).
- University Communications will continue to be responsible for the consideration, development and deployment of official campus Web standards and policies, and for support of these policies within the selected Web content management solution.
- The campus community will be kept informed and will be provided opportunities for being engaged in key aspects of this initiative on an ongoing basis.
- The pilot program will include a small but representative set of departments and other stakeholders with Web publishing needs.
- The Web content management solution will be deployed in a phased approach. Successful evaluation of pilot and initial sites is required before the solution becomes broadly available.
- Once a decision is made to adopt a content management solution, IET will partner with the campus in the integration of the solution into the campus technical infrastructure.
- University Communications' Web team will support the development and implementation of Web templates for users of the solution.
- The financial model associated with the system may be a consideration in the selection and deployment of the chosen solution. Funding options will be developed and discussed with all appropriate parties once functional requirements and likely options have been identified.

Business Requirements

The business requirements provide a framework for the identification and definition of functional and technical specifications that will be used to evaluate and select a Web content management solution for the campus. The business requirements also help to ensure that all project stakeholders have a clear and well-defined understanding of the organizational needs and high-level strategic vision that prompted and continue to motivate the initiative.

As identified by respondents to the UC Davis Web CMS survey (<http://cms.ucdavis.edu>), the selected Web Content Management solution shall support the organizational Web publishing and management needs of the campus by:

- Alleviating existing constraints due to limitations in the availability of time, resources, staff or technical knowledge upon those responsible for Web content publishing, development and management.
- Improving the efficiency of work processes associated with the creation, management and distribution of content and information via the Web by providing a consistent and robust tool set for campus webmasters and content managers.
- Facilitating compliance with brand identity, information architecture, design and technical standards as defined in official UC Davis Web Policy (PPM 310-70) to improve the efficacy of communications to campus audiences.
- Supporting graphic and architectural continuity throughout the campus's Web sites, while satisfying the communications needs of individual departments and better serving the needs of site visitors.
- Supporting compliance with campus, federal and state Web accessibility standards and policies.
- Offering a centralized, dynamic, flexible and high quality campus Web publishing platform.
- Providing a consistent and robust tool set for campus webmasters and content managers.

Project Governance and Organization

Steering Committee

The Steering committee is comprised of senior executives and principal stakeholders who are committed to the project and have the authority to make policy decisions that have department and campuswide impact. The committee provides guidance and direction to, and receives reports from, the core project team.

Core Project team

The core project team will oversee and document all project activities and will report progress, status and changes in the project plan or scope to the steering committee and the project's stakeholders. The team will also direct and oversee the project's activity committees, receiving regular reports from the chair of each committee, and ensuring close coordination between the various project teams. The project team will meet regularly, and be operational until target completion of Phase V (Deployment) of the Web Content Management Initiative.

Requirements and evaluation committee

The Requirements and Evaluation committee will be responsible for guiding the identification and prioritization of the campus's requirements, defining key features and functions, identifying evaluation criteria, developing use cases, evaluating CMS options, and documenting the capabilities and fit of various software-based solutions. The committee will consider all aspects of the campus's needs and constraints, including technical, content and workflow, accessibility, interface, impact on staff workload, and other requirements. The committee will develop a formal functional and technical requirements document for use in subsequent product and vendor identification and evaluation activities. The committee will also participate in the analysis and evaluation of potential options and the selection of a content management solution for the campus.

Implementation committee

The implementation committee will be responsible for developing and implementing a plan to guide the integration and deployment of the selected Web Content Management solution. The committee will bring together campus stakeholders, experts and resources critical to the successful installation of the selected Web Content Management solution on campus. The committee will plan and oversee the implementation process, and will conduct pilot tests and other evaluations to verify the readiness of the solution for broad acceptance and use by the campus community.

Communications committee

The communications committee will be responsible for developing and implementing a strategy to support and increase campus participation in and awareness of the Web Content Management Initiative. The committee will coordinate ongoing consultation with the campus community and collect and analyze feedback. The committee will develop communications to inform the community about the status of the initiative and about the selected Web Content Management solution. The committee will coordinate internal communications with pilot participants, report feedback for refinement and improvement of the system, and modify messaging strategy and communications tactics to maximize education, awareness and adoption of the initiative as necessary.

Training committee

The training committee will be responsible for developing and executing comprehensive educational programs related to the implementation, adoption and usage of the selected Web Content Management solution. The training committee will work with the communications committee to develop targeted curricula, online help and documentation, lesson plans, training methodologies and assessment tools, and provide outreach to support the learning requirements of the adopter community as well as the initiative's broad constituents.

Appendix I: Proposed Timeline and Process

Initial efforts in the Web Content Management Initiative included the establishment of a project infrastructure and core team, implementation of a project management system, research and surveys, and interaction with campus stakeholders.

In the coming months, the project team will focus on guiding the activities of committees tasked with identifying, evaluating and selecting a Web Content Management solution, and with the execution of a pilot program that will inform the development of a comprehensive, efficient and effective methodology for eventual rollout of the solution to the campus.

A comprehensive timeline is available for review at <http://cms.ucdavis.edu>

Appendix II: Teams and Committees

Up to date committee membership information is available for review at <http://cms.ucdavis.edu>

Steering Committee

The Steering committee is comprised of senior executives and principal stakeholders who are committed to the project and have the authority to make policy decisions that have department and campuswide impacts.

Functions

The Steering committee and its members will:

- Provide feedback, advice and input to the project team
- Approve direction and project goals defined by project team
- Resolve conflicts (e.g., resource, requirements conflicts)
- Monitor the status and progress of the implementation, including the project budget and funding
- Communicate with campus groups to champion ongoing project support and sponsorship
- Make decisions as appropriate to the authority of the members and to the charge of the committee
- Escalate issues and decisions within the organization as necessary to gain approval and acceptance on those issues or decisions, and
- Maintain a basic understanding of the system.

Membership

Lisa Lapin Assistant Vice Chancellor, University Communications	752-9842	lalpin@ucdavis.edu
Babs Sandeen Vice Chancellor, University Relations	752-2616	basandeen@ucdavis.edu
Peter Siegel Vice Provost, IET	752-4998	pmsiegel@ucdavis.edu

Core Project Team

The project team, which includes representatives from IET and University Communications, is charged with managing the execution of activities associated with the Web Content Management Initiative to ensure that the project is achieved according to the scope and goals.

The project team will document and oversee all project activities and will report progress, status and changes in the project plan or scope to the steering committee and the project's stakeholders. The team will also direct and oversee the project's activity committees, receiving regular reports from the chair of each committee. The project team will meet regularly, and be operational until target completion of Phase V (Deployment) of the Web Content Management Initiative.

Functions

The project team and its members will:

- Facilitate the achievement of the project goals
- Support the CMS project manager to execute project activities
- Report regularly to the executive steering committee
- Focus on and assist in the implementation of the CMS project
- Engage in and contribute to defining and producing project deliverables
- Be responsible for completion of project tasks
- Help promote the project throughout UC Davis
- Assist in the selection of a CMS technology solution
- Endorse statements, recommendations and/or reports for any submissions to the CMS steering committee, and
- Attend meetings, answer e-mails in a timely manner and utilize the initiative's Project Management system, methodologies, and resources.

Membership*

Roger Ashton Publications Manager, IET	754-6575	rmaston@ucdavis.edu
Jan Conroy Publications Director, University Communications	752-9839	jconroy@ucdavis.edu
Craig Farris Campus Webmaster, University Communications	752-9837	cfarris@ucdavis.edu
Elliot Lopez (Chair) Web Consultant/Project Manager, University Communications	752-9612	ellopez@ucdavis.edu
Babette Schmitt Director, Strategic Planning and Communications, IET	754-6373	eeschmitt@ucdavis.edu

*Activity committee chairs will also participate as members of the core project team.

Requirements and Evaluation Committee

The Requirements and Evaluation committee includes technical, communications and administrative stakeholders and representatives from across campus. The committee will be responsible for identifying the campus's use requirements, system features and functions; for evaluating solution options; and documenting the capabilities and fit for UC Davis of solution options under consideration. The committee will work with the purchasing department as required by campus policy.

The committee will meet and report progress, status and pertinent information to the Core Project Team on a regular basis.

Functions

The Requirements and Evaluation committee and its members will:

- Gather, identify and prioritize the campus's functional and technical requirements
- Develop a functional and technical requirements document for use in the evaluation and selection process
- Identify and pre-qualify Web Content Management solutions for formal consideration
- Document the capabilities and fit of pre-qualified solutions
- Develop use cases
- Evaluate solution options, document findings, and formally recommend solutions that should be considered for adoption by the campus

The committee will consider all aspects of the campus's needs and constraints, including technical, content and workflow, accessibility, interface, impact on staff workload, and other requirements.

Membership

Roster available online at <http://cms.ucdavis.edu>

Implementation Committee

The implementation committee will be responsible for developing and implementing a plan to guide the integration and deployment of the selected Web Content Management solution. The committee will bring together campus stakeholders, experts and resources critical to the successful installation of the selected Web Content Management solution on campus. The committee will plan and oversee the implementation process, and will conduct pilot tests and other evaluations to verify the readiness of the solution for broad acceptance and use by the campus community.

The committee will meet and report progress, status and pertinent information to the Core Project Team on a regular basis.

Functions

- Identify, acquire and mobilize assets, resources, tools and staff required for an efficient and successful deployment of the campus's Web Content Management solution
- Plan and oversee the deployment of infrastructure and software associated with the chosen solution
- Develop and execute a test plan to identify and address technical issues surrounding the implementation of the solution
- Organize and successfully deploy pilot sites under the Web Content Management solution
- Verify the readiness of the implemented solution for campus-wide deployment
- Develop an implementation plan to guide campuswide deployment of adopter Web sites under the solution

Membership

TBD

Communications Committee

The communications committee will be responsible for developing and implementing a strategy to support and increase campus awareness of and participation in the Web Content Management Initiative. The committee will plan and execute communications tactics in support of the initiative, and will regularly solicit and gather information from the campus to inform decisions pertaining to the selection, integration and deployment of the solution.

The committee will meet and report progress, status and pertinent information to the Core Project Team on a regular basis.

Functions

- Coordinate ongoing consultation and dialog with the campus community
- Collect, analyze and report feedback and key information to the project team
- Develop communications to inform the community about the chosen solution and overall project status
- Coordinate internal communications with pilot participants
- Provide recommendations for refinement and improvement of the solution and its implementation based upon campus feedback
- Provide recommendations for refinement and improvement training initiatives
- Manage and oversee messaging strategy and communications tactics to maximize education, awareness and adoption of the initiative as necessary

Membership

TBD

Training Committee

The training committee will be responsible for developing and executing comprehensive educational programs related to the implementation, adoption and usage of the selected Web Content Management solution.

Functions

- Work with the communications and implementations committees to develop:
 - Targeted curricula
 - Online help and documentation
 - Lesson plans and training methodologies
 - Assessment tools
- Provide outreach to support the training requirements of solution adopters

Membership

TBD